



DramaDirectory

Your guide to European TV Drama Commissioning Editors and Buyers

2014
UPDATE





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Project Management: Orla Clancy,
Eibhlín Ní Mhunghaile
Designed by: Lir Mac Cárthaigh

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Lir Mac Cárthaigh





INTRODUCTION

The network of MEDIA Desks and Antennae in Europe is delighted to publish the second edition of the Drama Directory, a Guide to European TV Drama Commissioning Editors and Buyers.

We had become aware of an information gap in this area in our work with clients, in particular with applicants for the TV Broadcasting support scheme. We thought the best way to address this was to make use of our own network, with each MEDIA Desk providing information on TV Channels in its own territory. It has proved to be a rewarding collaboration – a true European co-production.

We would like to take this opportunity to thank the participating Broadcasters for their generosity in providing the information contained in this Directory, the European Audiovisual Observatory for allowing us to use information from the MAVISE database and the Broadcasting Authority of Ireland for sponsoring this publication.

This directory is complementary to all market and database initiatives funded by MEDIA with the aim to achieve a transparent single market for all Audiovisual programmes in Europe. Examples of other MEDIA publications include the Training and Networks guide and the Markets and Networks Guide which can be downloaded from the MEDIA website.

We hope the Drama Directory will continue to be a useful resource for Television Drama Producers and Broadcasters alike. We welcome your feedback and suggestions for future editions.

THE MEDIA DESKS AND ANTENNAE





AUSTRIA

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The most important broadcaster in Austria is still the public service ORF, which has gradually been losing market share since the introduction of private television. The channels ORF1 and ORF2 had a combined average market share of 37% in 2010 (down almost 10% since 2006). ORF2 is still the most popular channel, with 22.5% of viewers on average. German television is also popular in Austria. The main German private channels have Austrian versions, with a combined audience share in 2010 of more than 25% (the most important of these being RTL Österreich, Sat1 Österreich and ProSieben Austria). German public service channels had a combined audience share of more than 10%. The main private channel is ATV (launched in 2003) with an audience share of 3.4% in 2010. More private channels have recently been launched: Austria 9 TV, (Burda Verlag) in 2007; and Puls 4 (ProSiebenSat.1 Media AG) in 2008. In 2009 Salzburg TV was rebranded as Servus TV and became a national channel. (Audience data source: Eurodata TV Worldwide/ AGTT / GfK Teletest).

Following an investigation completed by the European Commission in 2009 regarding the financing and remit of the public broadcaster ORF, a new media law was passed in July 2010. The regulatory authority KommAustria, was given responsibility for legal supervision of the public service broadcaster (ORF). The financing of the ORF should follow EU standards regarding commercial and non-commercial activities, and a clear public service remit of the broadcaster should be developed. New services have to undergo a “public interest test”.



Das Jüngste Gericht, (The Last Judgement), 2007 – Production Company: Lisa Film

AUSTRIA



ORF

ORF is an independent public service broadcasting corporation. It has two national TV channels: ORF 1 and ORF 2 plus four national and nine regional radio channels, all financed by licence fees and advertising. The TV channels are complementary and are both transmitted by terrestrial network as well as satellite in collaboration with 3sat.

ORF-Zentrum,
Würzburggasse 30,
A - 1136 Wien,
Austria.

T: 43 87878 0
F: 43 1 87878 13732
kundendienst@orf.at

www.orf.at

Mr. Heinrich Mis
Commissioning Editor, TV-movies
heinrich.mis@orf.at
+ 43 1 87878

Ms. Andrea Bogad-Radatz
Commissioning Editor, Film and Series
andrea.bogad-radatz@orf.at
+ 43 1 87878

AUSTRIA



BELGIUM

The three Communities (Flemish, French and German-speaking) each have responsibility for audiovisual communication and constitute separate markets, the common feature being the fact that all three markets have been extensively cabled for three decades and are thus able to receive the channels of neighbouring countries. They each have their own systems of regulating the audiovisual media and their own public service broadcasters, namely the VRT, the RTBF and the BRF respectively.

The main players in the Flemish Community are VRT, which operates the public channels Één, Ketnet and Canvas, and VMMa (Vlaamse Media Maatschappij), which runs the channels VTM, 2BE, Anne, Jim and vtmKzoom.

Één (VRT) continues to dominate the market, with a steadily rising daily audience share, which reached 33% in 2010 (compared with 28.7% in 2006). Behind Één in audience terms are the channel VTM (20.4%) and the second public channel Ketnet/Canvas (children's programmes during the day and cultural programmes in the evening), followed by VT4 and 2BE. The rest of the market is split between a number of special interest channels set up in the Flemish Community as well as French and Dutch language channels.

In the French Community, the main operators of television channels are, apart from RTBF (La Une, La Deux and La Trois), the RTL group, with its three channels RTL-TVI, Club RTL and Plug RTL that target Belgium but operate under Luxembourg law, and the AB group (AB3, AB4 and AB Shopping). RTBF has significantly modified its range of channels in 2010: it ceased broadcasting its international channel RTBF Sat in February, launched HD versions of its three channels in May and revamped the programming line-up of La Trois in September.

RTL-TVI continues to dominate the market with a 21.5% daily audience (and a prime time market share of 28.8%). The second most important Belgian channel is La Une (RTBF), with a 14.5% market share. The other Belgian channels have a combined share of less than 5% (Club RTL, La Deux, AB3, etc) and a significant number of viewers still turn to the French channels, which command about a third of the audience share. (Audience data source: Eurodata TV Worldwide / CIM / GfK Audimétrie SA)

In the German-speaking Community, the majority of the population (about 74 000 inhabitants) choose to watch the German television channels.

Almost 100% of Belgian households subscribe to pay-TV, this mainly being due to the extent of the country's cable network.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



The Spiral. Produced by Caviar, Belgium. Developed with the support of the MEDIA Interactive support scheme.

BELGIUM



BTV (BELGIUM TELEVISION SA)

AB3 – AB4
7 rue de Livourne
1060 Bruxelles
Belgium

T: +32 2 650.09.20
F: +32 2 646.07.12
info@ab3.be

www.ab3.be

Mr Rolland BERDA
Managing Director

Mr Philippe ZRIHEN
Head of programming
Philippe.zrihen@ab3.be

BELGIUM (FRENCH-SPEAKING)



Owned by cable operator Tecteo, BeTV offers a digital package of thematic channels (pay TV), Be Premium, including cinema (Be1, Be Ciné), series (Be Series) and sports (Be Sport 1, 2 and 3). It also distributes specialized services (Be Enfant, Be Documentaires, Be Charme) as well as a VoD catalogue. 61% of the programming on Be1 is made of films. Most of its acquisitions come from Canal + France.

Chaussée de Louvain 656
B-1030 Brussels
Belgium

T: +32 2 730 02 11
F: +32 2 732 18 48
info@betv.be

www.betv.be

Mr Frédéric Vandeschoor
Managing Director

Mr Christian Loiseau
Head of Programming
Christian.loiseau@betv.be

Mr Philippe Logie
Head of Acquisition
philippe.logie@betv.be

Ms Nathalie Masset
Films Acquisition
Nathalie.masset@betv.be

BELGIUM (FRENCH-SPEAKING)



RTL-TVI – CLUB RTL – PLUG TV

Avenue Georgin 2
B-1030 Brussels
Belgium

T: +32 2 337 69 91
F: +32 2 772 72 36

[www.rtl.be](http://www rtl be)

Stéphane Rosenblatt
Director of Programmes
stephane_rosenblatt@clt-ufa.com

Patrick Van Den Bosch
Head of Acquisitions
pvandenbosch@rtl.be

Erwin Lapraille
Deputy Director TV
elapraille@rtl.be

BELGIUM (FRENCH-SPEAKING)



RTBF, the public broadcaster in the French-speaking community, operates 3 channels: la Une, la Deux, la Trois. La Une is focused on information, entertainment and generalist programmes. La Deux is more oriented towards series and sports. La Trois is a children's channel in the daytime and a more cultural one (documentaries & films in original version) in the evening.

Boulevard A. Reyers 52
B-1044 Brussels
Belgium

T: +32 2 737 25 44
F: +32 2 737 43 81

www.rtbf.be

François Tron
Director of Programmes
dirtv@rtbf.be
+3227374633

Arlette Zylberberg
Head of Fiction
azy@rtbf.be
+322 7372504

Eric Poivre
Head of Programming
epo@rtbf.be
+3227372546

Valérie Lardinois
Films & Fictions Acquisitions
vall@rtbf.be
+322 7374831

Anne Leduc
Commissioning Editor Fiction
aled@rtbf.be

BELGIUM (FRENCH-SPEAKING)



ACHT

Acht TV is a Dutch language Pay TV Fiction channel broadcasting mainly HBO programming.

Acht
Bites Europe NV
Bloemenstraat 32
1000 Brussel

T: +32 2 211 05 10
vragen@acht.tv

www.acht.tv

Vincent Loozen
Sales and acquisition manager
(Netmanager)
vincent@acht.tv
+32 2 211 05 10

BELGIUM (FLANDERS)



VRT (VLAAMSE RADIO- EN TELEVISIEOMROEP) ÉÉN.

Auguste Reyerslaan 52,
1043 Brussels,
Belgium

T: 32 2 7413 111
F: 32 2 7349 351

www.vrt.be

Hilde Debackere
Head of Acquisitions
hilde.debackere@vrt.be

Elly Vervloet
Assistant net-manager
elly.vervloet@vrt.be
+32 2 7413950

VRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile. From May 2012 on Canvas and Ketnet will operate as separate channels.

BELGIUM (FLANDERS)



VRT (VLAAMSE RADIO- EN TELEVISIEOMROEP) CANVAS

Auguste Reyerslaan 52,
1043 Brussels,
Belgium

T: 32 2 7413 111
F: 32 2 7349 351

www.canvas.be

VRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile.

Sven Van Lokeren
Acquisition Executive (Series)
sven.vanlokeren@vrt.be
+32 2 7415981

Catherine Wilmes
Acquisition Executive (Film)
catherine.wilmes@vrt.be
+32 2 7413315

BELGIUM (FLANDERS)



SBS BELGIUM, VT4 AND VIJFTV

VT4 is a private generalist channel with national coverage in Belgium, but focusing on the country's Flemish (i.e. Dutch speaking) community. VT4 offers free tv and broadcasts 168 hours per week. VIJFtv is a lifestyle free tv channel specifically targeted at (young) women in the Belgian-Flemish community. VIJFtv also airs 168 hours per week.

SBS Belgium nv
Fabrieksstraat 55
B- 1930 Zaventem
Belgium

T: 02/715.11.50
F: 02/720.70.96
info@sbsbelgium.be

www.sbsbelgium.be
www.vt4.be

Stefanie Segers
Acquisition & Distribution Manager
Stefanie.segers@sbsbelgium.be
+32 2 715 11 99.

BELGIUM (FLANDERS)



VMMA (VLAAMSE MEDIA MAATSCHAPPIJ), VTM AND 2BE

Mediaalaan 1,
1800 Vilvoorde
Belgium

T: +32 022 55 32 11
F: +32 022 55 51 41

www.vtm.be
www.2be.be

An Rydant
Netmanager and Head of Drama
an.rydant@vmma.be
Scenarios, pitches and purchase of films:
jan.creuwels@vmma.be

Luc Janssens
Foreign Acquisitions Manager
luc.janssens@vmma.be

BELGIUM (FLANDERS)



CYPRUS

The broadcasting market in Cyprus is dominated by the channels of the public service broadcaster CYBC (RIK1, RIK2, RIK HD and RIK Sat), which had a combined audience share of 19.7% in 2010, and four national private channels: Sigma, ANT1, Mega and Plus TV, who all registered an increased audience share in 2010 (21.3%, 20.7%, 14.3% and 4.1% respectively). (audience data source : Eurodata TV Worldwide / AGB Nielsen Media Research Cyprus)

As well as ANT1 and Mega, a new sister channel of a Greek commercial station was launched in 2011 (Mad Cyprus) and another is expected by the end of 2011, with the free terrestrial channel Star Channel Cyprus due to replace terrestrial pay-TV channel Alfa TV, which was taken off the airwaves in summer 2011.

The transition to DTT has particularly affected the local television landscape in Cyprus. In the absence of a local DTT network, several local stations have begun to broadcast nationally, in some cases with a revised programme schedule, while others have had to cease broadcasting either temporarily or permanently.

Analogue terrestrial signals were switched off on 1 July 2011, after a short transitional period.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



CYPRUS BROADCASTING, CORPORATION (CYBC)

PO BOX 24824
1397 Nicosia
Cyprus

T: +357 22862000
F: +357 22314050

www.cybc.com.cy

Themis Themistocleous
Director General Cyprus
Broadcasting Corporation
themis.themistocleous@cybc.com.cy
T: +357 2286 2345

Evi Papamichael
Head of Acquisitions –Television
Department
evi.papamichael@cybc.com.cy
T: +357 2286 2412
F: +357 2231 5806

CYPRUS



ANT1 TV

Launched in 1993, Ant1 TV is an analogue terrestrial generalist channel with national coverage, broadcast in Modern Greek. The channel is free and active 168 hours per week. Ant1 TV is a sister channel of ANT1 TV (Greece). It was the first private channel to be launched after Cyprus broadcasting liberalisation.

Megaron 5, 2311 Strovolos
P.O.BOX 20923
1665 Nicosia
Cyprus

T: +357 22200200
F: +357 22200210

www.antenna.gr

Mr. George Kotziamanis
**TV Programmer/Commissioning
Editor**
g.kotziamanis@antenna.com.cy

Mr. Constantinos Odysseos
**TV Programmer/Commissioning
Editor**
odysseos@antenna.com.cy

CYPRUS



MEGA

MEGA is a private Digital terrestrial channel – a sister channel of one of the main Greek commercial stations. It is a generalist channel broadcasting in modern Greek.

Mega Channel
Address: Patriarchi Petrou Z' No. 15,
2054 Strovolos – Nicosia
Cyprus

Mr. Giorgos Chouliaras
TV Program Commissioning Editor
g.chouliaras@megatv.com.cy
T: +357 22 477700
F: +357 22 477737

Ms. Riana Odysseos
TV Program Commissioning Editor
r.odysseos@megatv.com.cy
T: +357 22 477955
F: +357 22 477737

CYPRUS



SIGMA TV

P.O.BOX 21836,
1513 Nicosia
Cyprus

T: +357 22580100
F: +357 22580221

www.sigmatv.com

Mrs Soulla Ioakeimidou
**TV Programmer/Commissioning
Editor**
soulla@sigmatv.com

Mr. Alexis Nicolaou
**TV Programmer/Commissioning
Editor**
alexis@sigmatv.com

Ms Eliza Vlachou
Foreign Programme Manager
vlachou@sigmatv.com

CYPRUS



CZECH REPUBLIC

SOURCE: MAVISE Database – a database provided by the European Audiovisual programmes and the funding of Czech cinematography

In the Czech Republic, the television market continues to be dominated by the private channel Nova TV (Central European Media Enterprises), which in 2010 had a market share of 28.9 % (down 13 % since 2006). The public service broadcaster Czech Television, had a total market share of 27 % thanks to the growth of CT24 and CT4. In third place is the private channel Prima TV (Modern Times Group), which had a share in 2011 of 17.4% (down from 20.2% in 2006). (Audience data source: Eurodata TV / ATO / Mediaresearch)

All the main operators have launched additional channels over the past 3-4 years. The Nova TV family channels include Nova Sport and Nova Cinema and the female oriented channel Fanda launched in 2012. The public service broadcaster has a sport and a news channel (CT 4 Sport and CT 24), and has also launched several HD channels. Prima TV also has two entertainment channels: Prima Cool targeting men, and Prima Love, which targets women. A new national commercial channel TV Pětka was launched in October 2012. Analogue terrestrial television was switched off in June 2012. Digital Terrestrial Television is the most important distribution platform in the Czech Republic serving more than 30% of homes. IPTV has taken off in the Czech Republic with a total of 5 competing offers.

On 6 September 2011 the Parliament of the Czech Republic adopted amendments to audiovisual legislation that concern advertising and teleshopping in public television. From January 2012 advertising was removed from the channels CT1 and CT24 (News). The other channels will continue to have advertising but the time allocated to advertising on CT2 and CT4 should not exceed 0,5% of the daily broadcasting time.



ČESKÁ TELEVIZE (CZECH TELEVISION)

Kavčí hory
140 70 Praha 4
Czech Republic

T: +420 261 131 111
F: +420 2 6113 7308

www.ceskatelevize.cz

Jan Maxa
**Director, Department of
Programmes and Formats
Development**
jan.maxa@ceskatelevize.cz

Václav Kvasnička
Head of Acquisitions Department
vaclav.kvasnicka@ceskatelevize.cz

Alena Poledňáková
Head of Acquisitions – Drama
alena.polednakova@ceskatelevize.cz

Markéta Štinglová
**Manager of International Content
Projects Center**
marketa.stinglova@ceskatelevize.cz

CZECH REPUBLIC



TV NOVA

CET 21, spol. s r. o.
Kříženeckého náměstí 1078/5
152 00 Praha 5
Czech Republic

T: +242 464 111

tv.nova.cz

CET 21 is a private broadcaster which broadcasts on several channels: Nova (private channel with the biggest market share), Nova Cinema, Nova Sport (sport channel) and MTV Czech Republic. The programming of Nova is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Nova Cinema offers mostly feature films and TV series.

Alexandra Ruzek
**Director of Programming and TV
Channels**
alex.ruzek@nova.cz

Alexandra Bezpalcová
Head of Acquisitions
alexandra.bezpalcova@nova.cz

Petra Bohuslavová
Acquisitions
petra.bohuslavova@nova.cz

CZECH REPUBLIC



PRIMA TV

FTV Prima is a private broadcaster which broadcasts on three channels, Prima family, Prima COOL and Prima Love. Prima family's programming is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Prima COOL is an entertainment channel broadcasting mainly American films, TV series, sport and entertainment programmes. Prima Love is a new channel (broadcasting since March 2011) targeted at women, broadcasting films, TV series and talk shows.

FTV Prima, spol. s r. o.
Na Žertvách 24/132
180 00 Praha 8 - Libeň

T: +420 266 700 111

www.iprima.cz

Jan Rudovský
Head of Aquisition
jan.rudovsky@iprima.cz

CZECH REPUBLIC



HBO CZECH REPUBLIC

HBO Czech Republic is the Czech subsidiary of Home Box Office (HBO). It is transmitted by cable and satellite networks and it broadcasts mostly feature films, TV series and documentaries. It operates several channels: HBO, HBO2, Cinemax, Cinemax2 and AXN.

Jankovcova 1037/49
170 00 Praha 7
Czech Republic

www.hbo.cz

Jana Malířová
Acquisition Manager
jana.malirova@hbo.cz
+420 261 094 500

CZECH REPUBLIC



DENMARK

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The Danish market is the only one in Europe in which public channels, operated by the two public broadcasters, DR and TV2, still attract more than half of average daily audiences. The TV2 channel continues to dominate the market (28.1% of daily audiences in 2010), followed by DR1 (19.2%). The two main public channels therefore account for 47.2% of average daily audiences in 2010 (61.9% in 2006). Despite the creation of various special-interest channels, the entire public sector saw its total audience drop from 72.4% in 2006 to 62.9% in 2010. The most popular private channel is TV3 (Swedish MTG group), with a steady daily market share of 5%. The other main private channels are TV3+ (MTG group, 3.4% daily audience share) and Kanal 5 (ProSiebenSat.1 Media AG), whose daily audience share grew from 2.9% in 2009 to 3.4% in 2010. (Audience Data Source: Eurodata TV Worldwide / Gallup TV meter)

The Danish public authorities decided to privatise TV2 in May 2003, but implementation of this decision was delayed after questions were raised concerning the financing of the broadcaster. In May 2004, the European Commission concluded that TV2 had received illegal public funding and demanded that it pay back EUR 84.4 million to the Danish authorities. An appeal was lodged against the recapitalisation plan and the Court of First Instance of the European Communities set aside the Commission's decision in its judgment of 22 October 2008. In spring 2008, the Ministry of Culture announced that emergency aid would be provided to stabilise TV2, which is heavily in debt. This aid, amounting to EUR 67 million, was approved by the European Commission in August 2008. Finally, in January 2009 the government published a plan aimed at partially transforming TV2 into a pay-TV channel from 2012.



Dicte, 2013. TV2



Lærkevej (Park Road), 2009. Production Company: Cosmo Film

DENMARK

DR TV

DR (Danish Broadcasting Corporation) is Denmark's oldest and largest electronic media enterprise. The corporation was founded in 1925 as a public service organization and the TV channel in 1951. DR does not possess any RTB licence but has signed a public service contract with the Ministry of Culture. The channel is completely financed by public revenues (there are no advertising revenues). DR TV comprises two channels, DR1 and DR2 - and four new channels from November 2009: DR K (Culture, history, music), DR Ramasjang and DR Ultra (Children's programming) and DR3 (Youth). Over the years DR has built up a strong fiction brand, especially on Sunday evenings at 20h. DR has produced a number of award winning tv series, such as *The Protectors* (2010), *Unit One* (2002), *Nikolaj & Julie* (2003), *The Eagle* and *Young Andersen* (2005). And with additional nominations for series like *Better Times* (2004), *The Killing* (2007 and 2008), *Mille* (2009), *Broen* (2011) and *Borgen* (2010) DR has established itself as an important player in the international world of drama production.

Emil Holms Kanal 20
DK - 0999 Copenhagen C
Denmark

T: +45 3520 3040
F: ++45 3520 3040
dr@dr.dk

www.dr.dk

Pil Gundelach Brandstrup
CEO DR1
pibr@dr.dk
+45 35 20 83 05

Ditte Christiansen
Co-producer, Fiction
dich@dr.dk
+45 35 20 42 22

Inge Kastoft
Program coordinator
ika@dr.dk
+45 35204040

Irene Strøyer
Editor, DR3
ires@dr.dk
+45 3520 337

Nadia Kløvedal Reich
Head of Fiction
nklr@dr.dk
+45 35 20 28 54

Steen Salomonsen
Head of acquisitions, Fiction
ssa@dr.dk
+45 35203929

Flemming Hedegaard Larsen
Editor DR K
fhl@dr.dk
+45 3520 4089

Kirstine Vinderskov
Editor in chief, Children and youth
kii@dr.dk
+45 35 20 44 10

Piv Bernth
Head of Drama
pvb@dr.dk
+45 35 20 42 40

Bertel Kaare Schmidt
Editor, TV series
kash@dr.dk
+45 35204019

Peter Gren Larsen
Editor, fiction DR2
pegl@dr.dk
+45 35204045

Helene Aurø
Head of Sales, DR International Sales
heau@dr.dk
+45 3520 39 57

DENMARK



TV2

TV 2 is a publicly owned television station in Denmark based in Odense. The schedule is Public Service driven with emphasis on a fullrange schedule and a strong backbone of Danish produced programming. TV 2's economy is solely based on advertising revenues.TV 2's overall share (21-50) is 30% and the commercial share (21-50) is 49%. TV 2 has five subsidiary stations known as TV 2 Zulu, targeted at youth, TV 2 Charlie, oriented towards older audiences, TV 2 News, TV 2 Film, a non-stop movie channel and TV 2 Fri (leisure channel), as well as the internet-based pay-per-view channel TV 2 Play. TV2 has aired a number of successful Danish TV fiction, such as *Anna Pihl*, *Lærkevej* and *Dicte* (all MEDIA supported).

TV2/Danmark (Odense)
Rugårdsvej 25, 5100 Odense C, Denmark

T: +45 6591 9191 (Odense)
T: +45 39 75 7575 (Copenhagen)
F: +45 6591 3322 (Odense)
tv2@tv2.dk

www.tv2.dk

TV2/Danmark (Copenhagen)
Teglholm Allé 16, 2450 Copenhagen SV
Denmark

Lotte Lindegaard
CEO TV2 Channel
loli@tv2.dk

Susanne Funder Mikkelsen
Commissioning Editor & Buyer
sumi@tv2.dk

Thomas Breinholt
Head of Development
thbr@tv2.dk

Hans Peter Blicher
Commissioning Editor & Buyer
hpbl@tv2.dk

Annette Rømer
Head of Programmes, Acquisitions & Production

Katrine Vogelsang
Head of Fiction
kavo@tv2.dk

Malene Nordahl
Editor, Fiction
mano@tv2.dk

Sune Roland
Head of TV2 Networks (TV2 Zulu and TV2 Charlie)
suro@tv2.dk

DENMARK



TV3 DENMARK

TV3 is one of the channels owned by the Viasat Corporation. They are broadcasting from the UK. There are a number of sister channels like TV3+, TV3 Puls, TV2 Sport, Viasat Film and more. The last few years TV3 has started to include Danish TV-fiction in their schedule and have had success with series like *2900 Happiness* and *Lulu & Leon*.

TV3 Danmark
Strandlodsvæj 30
2300 København S

T: +45 77 30 55 00
F: +45 77 30 55 10
tv3@viasat.dk

Morten Mogensen
Head of Programming
morten.mogensen@tv3.dk
+45 77 30 56 23

Peter Slot
Head of Acquisitions
peter.slot@tv3.dk

DENMARK



SBS TV

SBS TV is part of one of Europe's biggest TV and radio broadcasters, the German ProSiebenSat1 Media. In Denmark SBS TV consists of four TV stations Kanal 4, Kanal 5, 6'eren and The Voice TV plus two radio stations The Voice and Nova.

SBS TV A/S
Mileparken 20 A
2740 Skovlunde

T: +45 7010 1010
info@sbstv.dk

www.sbstv.dk

Lars Ellegaard
Head of Programming
lars.ellegaard@sbstv.dk

DENMARK



FINLAND

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Finland is one of Europe's most advanced countries in terms of digital broadcasting: analogue terrestrial signals were switched off in 2007 and cable television transmissions have also been fully digitised since 2008. Finland is now turning to second generation digital terrestrial television (DVB-T2). However, these changes have not radically altered the balance in the broadcasting market, where the main players remain the public group YLE (YLE TV1, YLE TV2, YLE Teema and Swedish-language channel YLE FST5), the Finnish private media group Sanoma (Nelonen, JIM, LIV) and Swedish group Bonnier (MTV3, Sub and Nordic Canal+ pay-TV channels).

The public broadcasting group YLE regained some ground in 2010 and had an audience market share of 45.1%. In particular, YLE TV1 stabilised its daily audience market share at 21.6%, whilst YLE TV2 gained more than a percentage point to return to 19.4%. The audience of the first private channel, MTV3, has continued to decline reaching 21.5%, which is a loss of nearly 8% since 2006. (Audience Data Source: EurodataTV Worldwide/Finnpanel)

The Finnish multi-channel distribution market continues to be dominated by cable services. Although there are still more than 20 active operators, the market is becoming more concentrated. In particular, in July 2010, DNA took control of the cable activities of Sanoma Television, i.e. its Welho package.

Due to the popularity of cable television in Finland, satellite and IPTV packages are struggling to break through.



Jälkilämpö (*Latent Heat*), 2009 – Production Company: Kinotar Oy



Alamaailma (*Underworld Trilogy*), 2011 – Production Company: Vertigo Oy

FINLAND



MTV MEDIA

Ilmalantori 2,
00033 MTV3
Helsinki,
Finland

T: +358 10 300 300

www.mtv3.fi

MTV MEDIA has 10 TV channels: MTV3, Sub, AVA and the MTV3 Channel Package, which is a pay-TV package comprising MTV3 MAX, MTV3 Fakta, MTV3 Leffa, MTV3 Juniori, MTV3 Komedia, MTV3 Sarja and MTV3 SciFi. MTV MEDIA represents CANAL+ pay-TV services in Finland. MTV MEDIA (MTV Oy) is owned by Nordic Broadcasting Oy, which is owned by the Swedish publisher Bonnier AB. The MTV3 Channel Package was launched in November 2006. MTV MEDIA has been representing the CANAL+ pay-TV Services since 2009.

Sarita Harma
Head of Drama
sarita.harma@mtv3.fi

Tiina Karo
Senior Acquisitions Executive
tiina.karo@nelonenmedia.fi
T: +358 9 4545 610
F: +358 9 4545 412

Karoliina Kytömaa
Senior Acquisitions Executive
karoliina.kytomaa@nelonenmedia.fi
T: +358 9 4545 416
F: +358 9 4545 412

FINLAND



NELONEN MEDIA (CHANNEL FOUR FINLAND) / SANOMA ENTERTAINMENT FINLAND LTD.

PO BOX 350
00151 Helsinki,
Finland

T: + 358 9 45 451
F: +358 9 4545 412

www.nelonen.fi

Mikko Aromaa
Senior Acquisitions Executive,
Feature Films
mikko.aromaa@nelonenmedia.fi
T: +358 9 4545 625
F: +358 9 4545 412

Tiina Karo
Senior Acquisitions Executive
tiina.karo@nelonenmedia.fi
T: +358 9 4545 610
F: +358 9 4545 412

Karoliina Kytömaa
Senior Acquisitions Executive
karoliina.kytomaa@nelonenmedia.fi
T: +358 9 4545 416
F: +358 9 4545 412

FINLAND



THE FINNISH BROADCASTING COMPANY (YLE)

YLE Centre, Radiokatu 5,
Helsinki 00024
Yleisradio.

T: +358-9-14801

www.yle.fi

Yle is Finland's national public service broadcasting company. Yle operates four national television channels and six radio channels and services complemented by 25 regional radio programmes

Tarmo Kivikallio
Head of Programme Acquisitions
tarmo.kivikallio@yle.fi

Johanna Salmela
Acquisitions Executive, Drama
(USA, Canada, Asia, Australia, Latin America)
johanna.salmela@yle.fi

Johan Fornäs
Acquisitions Executive, Drama,
Feature Films, (Arthouse, Nordic)
johan.fornas@yle.fi

Vesa Nykänen
Acquisitions Executive, Feature Films
(Mainstream, Classics)
vesa.nykanen@yle.fi

Erkki Astala
Executive Producer, Co-Productions
erkki.astala@yle.fi

Mari Koivuhovi
Acquisitions Executive, Drama
(Europe)
mari.koivuhovi@yle.fi

FINLAND



FRANCE

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The channel TF1 still has the largest audience share but only had a daily audience share of 24.5% in 2010, which was 7.1 percentage points lower than in 2006. This was the third consecutive year in which the private channel's daily audience was below 30%. In second and third place respectively were the two public channels France 2 (16.1%) and France 3 (10.7%), both of which are also experiencing a steady decline in their audiences. In particular, France 3 is followed close behind by M6 (10.4%). Following these, eleven channels have audience market shares of between 1 and 4%. These include a number of new free-to-air DTT channels, such as TMC (TF1 Group) and W9 (RTL), which hold market shares comparable to those of the incumbent terrestrial channels, such as Canal+, France 5 and Arte. The new free-to-air DTT channels had a combined daily audience share of 19.7% in 2010, compared with 15.2% in 2009 and 11.1% in 2008. (Audience data source: Eurodata TV Worldwide / Médiamétrie / Médiamat).

The Canal+ group's acquisition of the TPS package in 2007 was challenged in September 2011 by the Competition Authority, which withdrew its decision to allow the merger and fined Canal+ 30 million euros, stating that the company had not met the commitments it had entered into at the time (especially with regard to making channels available to third-party distributors). In addition, Canal+ and Orange, which were for a long time locked in a dispute about rights and channel exclusivity, announced they had reached an agreement in July 2011 on the acquisition by Canal+ of a 33.33% stake in Orange Cinéma Séries, the package that groups together Orange's five premium cinema and fiction channels.

The reform of public audiovisual services, which began in 2008, has continued to generate debate in France. The public broadcasters were combined into a single company (France Télévisions) on 1 January 2010.



Borgia. Produced by Canal+, Atlantique and EOS with the support of the MEDIA TV Broadcasting scheme.

FRANCE



ARTE FRANCE

8, rue Marceau,
92785 Issy-les-Moulineaux
Cedex 9
France

T: +33 (0)1 5500 7777
+33 (0)3 8814 2222
F: +33 (0)1 5500 7700
+33 (0)3 8814 2200
artep@artefrance.fr

communication@arte-tv.com
personnel@arte-tv.com
www.arte-tv.com

Vincent Meslet
Director of Arte projects
v-meslet@artefrance.fr

Michel Reilhac
Cinema Director
m-reilhac@artefrance.fr

Judith Louis
Fiction Director
j-louis@artefrance.fr

Christilla Huillard-Kann
Commissioning Editor (Buyer)
c-huillard-kann@artefrance.fr

ARTE is a French-German cultural channel broadcast by a French-German trust consisting of ARTE France and ARTE Deutschland GmbH, each holding a share of 50%. The two country poles deliver proposals for programmes. The central office of ARTE, located in Strasbourg, is responsible for the editorial line of programmes, the programme schedule and the broadcast.

FRANCE



ARTE GEIE

Service Téléspectateurs
4, Quai du Chanoine Winterer
CS 20035
F- 67080 Strasbourg Cedex
France

T: +33 3.88.14.22.22
F: + 33 3.88.14.22.00

www.arte-tv.com

Silvie Corso
Multi-lingual Productions,
Responsible for Acquisitions
s-corso@arte-tv.com

Lisa Muller
In Charge of Fiction Programming,
Film and Fiction Department.
l-mueller@arte-tv.com

Andreas Schreitmuller
Responsible for Fiction and Film
a-schreitmuller@arte-tv.com

FRANCE



CANAL J

Canal J is a Children's (4-14) entertainment channel. Magazines, fiction, cartoons, etc.

78, rue de Serres
Paris Cedex

T: +33 (0)1 5636 5555
F: +33 (0)1 5636 5559
tachaine@canalj.fr

www.canalj.fr
www.canalj.net

Emmanuelle Baril
Director of acquisition
emmanuelle.baril@canalj.fr

Caroline Mestik
Directrice des programmes
Caroline.mestik@canalj.fr

FRANCE



CANAL PLUS

National generalist pay-tv channel whose programming mainly consists of sports programmes, cinema, documentaries and magazines.

Canal Plus
1, place du spectacle
92130 Issy-les-Moulineaux
France

T: +33 1.71.35.35.35
F: +33 1.44.25.19.58

www.canalplus.fr
www.canal-plus.com

Manuel Alduy
**Head of the Cinema Department for
Canal+**
Manuek.alduy@canal-plus.com

Laurent Hassid
Head of Foreign Films Acquisitions
Buyer, Management
Laurent.hassid@canal-plus.com

Suzette Krick
Acquisition Manager
Buyer, Management
suzette.krick@canal-plus.com

Myriam Esnouf
Acquisition Executive (PPV-VOD)
Buyer, Legal/Finance
myriam.esnouf@canal-plus.com

FRANCE



DIRECT 8

Generalist channel broadcast on the digital terrestrial network.

Direct 8
31-32 quai de Dion Bouton
92811
France

T: 01 46 96 48 88

www.direct8.fr

Yann Le Prado
**Director of Acquisition ou Directeur
général adjoint**
y.leprado@direct8.net

Flor Husson-Dumoutier
In Charge of Acquisitions
f.husson-dumoutier@direct8.net

FRANCE



FRANCE 2

French national public service channel.

7, Esplanade Henri-de-France
75907 Paris cedex 15
France

T: +33 1.56.22.42.42
F: +33 1.56.22.56.32

www.france2.fr
www.francetvod.fr

Sabine Carion
**Adviser of Programming for Series,
Fiction and Soap**
s.carion@francetv.fr

Thierry Sorel
**Directeur de l'unité de programme
fiction**
Thierry.sorel@francetv.fr

Frédéric Prallet-Dujols
**Directeur Adjoint des Acquisitions de
Programmes**
frédéric.pralletdujols@francetv.fr

Catherine Wojtyczka
**Directrice Adjointe Negociation
Acquisitions Programmes**
emilie.gaspar@francetv.fr

FRANCE



FRANCE 3

National public service broadcaster with 13 regional units. The regions produce and co-produce both regional and national programmes.

7, esplanade Henri de France
75907 Paris Cedex 15
France

T: +33 1.56.22.30.30
F: +33 1.56.22.73.39

www.france3.fr

Francesca Dandolo
**Programming's Adviser At The
Cinema And Foreign Fiction Unit**
dandolo@exchange.france3.fr

FRANCE



FRANCE 4

Arts, fiction and entertainment channel. Owned by France Télévisions (89%) and Arte (11%).

19 rue Cognacq Jay.
Paris 75007
France

T: +33 (0) 1 40 62 65 50
info@france4.fr

www.france4.tv

Sophie Tran
Conseiller de Programmes Cinéma
Buyer, Other
sophie.tran@francetv.fr

FRANCE



LAGARDÈRE ACTIVE (CANAL J, GULLI, FILLE TV, TIJI)

JUNE (Ex-Filles TV)
78, rue Olivier de Serres.
Paris Cedex 15 75739
France

T: +33 (0) 156 36 55 27
news.june@lagardere-active.com

www.june.fr

Julia Tenret
Director of Acquisition (Fiction)
Julia.tenret@lagardere-active.com

Entertainment channel targeting female young adults (20 to 30 years old). Programming is composed mainly with TV fictions and magazines. The channel replaced Filles TV in October 2009, which was launched in 2004, targeting 11 to 17 year old girls.

FRANCE



M6

M6
89, avenue Charles de Gaulle.
Neuilly sur Seine 92575
France

www.m6.fr

Second free-to-air commercial generalist channel in France. 48,6% owned by RTL Group.

Bertrand Majani
Director of Acquisition
bmajani@m6.fr

Abigail Joliot
Acquisition – Cinema
ajoliot@m6.fr

FRANCE



13 ÈME RUE/SYFY (NBC UNIVERSAL GLOBAL NETWORK)

44 rue Washington
Batiement Monceau
75408 Paris Cedex 08
France

T: +33 1 70 60 79 00
F: +33 1 70 60 79 02

French cable and satellite channel.

www.13emerue.fr

Philippe Danon
Series & Documentaries
Programming Manager,
acquisition courts-métrages
philippe.danon@nbcuni.com

Kevin Deysson
Production & Acquisitions
Executive
kevin.deysson@nbcuni.com

FRANCE



RTL9 (FRANCE)

RTL9 is broadcast via cable and satellite in France, and has also long been broadcast on the analogue terrestrial network in Lorraine (French region located near the Grand Duchy of Luxembourg) and in the Grand Duchy of Luxembourg (but analogue transmissions were shut down in July 2010). RTL9 is jointly owned by Groupe AB and by CLT-UFA.

45 boulevard Pierre Frieden
Kirchberg
Luxembourg

T: +352 42 142 7831 / 7850
F: +352 42 142 7839

[www.rtl9.com](http://www rtl9 com)

Eric Lentulo
Responsable éditorial

FRANCE



SÉRIE CLUB

Série Club and TF6 (50%-owned), target audiences looking for entertainment and series.

120 Avenue Charles de Gaulle
92522 Neuilly sur Seine
France

serieclub@serieclub.fr
serieclub.m6.fr

Christine Hodanger
Responsable des acquisitions
chodanger@tf6.fr

FRANCE



1 quai du Point du Jour,
Boulogne Billancourt,
Cedex 92656
France

T: +33 (0)1 4141 1234
F: +33 (0)1 4141 2910 / 2840
comfi@tf1.fr

www.tf1.fr

TF1 is a national French TV channel, controlled by TF1 Group, whose major share-holder is Bouygues. TF1's average market share of 24% makes it the most popular domestic network. Flagship shows include Star Academy (Endemol's international competitor to the X Factor franchise), CSI and House, M.D. TF1 originally stood for Télévision Française 1 (French Television 1). Since its privatisation in 1987, the abbreviation is no longer expanded, so as to avoid confusion with the Entertainment channel targeting young adults. Jointly owned by the two main French commercial broadcasters (TF1 and M6).

Laurent Storch
**Directeur Générale Adjoint de
l'Antenne en charge des Programmes
et des Acquisitions**
lstorch@tf1.fr

Nathalie Biancolli
Head of Acquisitions Management
nbiancolli@tf1.fr

Sophie Leveaux
Artistique Director of acquisition
sleveaux@tf1.fr

Marie-Claire Sarry
Rights negotiation – acquisition
msarry@tf1.fr

FRANCE



TF1 INTERNATIONAL

Created in 1995, TF1 International is the worldwide distribution and acquisition arm of the TF1 Group, one of the leading media groups in France.

6, place Abel Gance
92100 Boulogne-Billancourt
France

T: +33 1.41.41.12.34
F: +33 1.41.41.21.33

www.tf1international.com

Nicolas Eschbach
**Directeur/Responsable des ventes et
acquisitions, Exportateur**
neschbach@tf1.fr

Romain Brémond
Producteur délégué, Acquisitions
rbremond@tf1.fr

Thierry de Courcelle
Acquisitions
tdecourcelle@tf1.fr

FRANCE



TV5

Number 1 French-language channel worldwide, reaching 120 million homes across the 5 continents.

131, avenue de Wagram
Paris Cedex 17 75805
France

T: +33 1.44.18.55.55
F: +33 1.44.18.55.10

www.tv5.org

Marjorie Vella
In charge of acquisition - cinema
marjorie.vella@tv5.org

Christophe Assezat
In charge of acquisition - fiction and documentary
christophe.assezat@tv5.org

FRANCE



GERMANY

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The television market in Germany is one of the largest in Europe and is also very competitive. More than 37 million households had a TV set at the end of 2010 in Germany, of which 50.2% received television by cable and 44.7% by satellite. The number of households with access to digital television had reached almost 68% by June 2011, according to the figures published by the ALM (Association of State Media Authorities).

Regarding audience share, the public service channels remain strong. The two national public service channels (ARD and ZDF) had a combined share of 25.9% in 2010 (down from 27.8% in 2006). For the first time RTL moved ahead of ARD (Das Erste) in 2010 to become the most popular channel, although only leading by a small margin (a difference of 0.4%). (Audience data source: Eurodata TV Worldwide / AGF / GfK)

Cable represents the most common mode of television distribution, and the digitisation of the network reached almost 43% by July 2011. The sector has experienced major consolidation in the last few years. There are now just four major operators. Kabel Deutschland, the country's leading cable operator, had 8.7 million subscribers in June 2011.

Changes to media legislation were introduced in the 15th amendment to the German Inter-State Broadcasting Treaty signed in December 2010. This addressed a reform of the collection of the licence fee for the public service broadcaster. The Prime Ministers of the German states agreed in June 2010 on a proposal that would impose a charge per household (household tax) rather than a charge per device that can receive broadcast signals. The changes are likely to be implemented from 2013. Future amendments to the Inter-State broadcasting Treaty will address protection of minors, and media concentration.



Welcome to the Club, 2013 - Production Company: Hager Moss Film (supported by the MEDIA TV Broadcasting scheme)



Hindenburg, a TV movie in two parts. Production company: teamWorx 2011 (supported by the MEDIA TV Broadcasting scheme). (Photo: RTL)

GERMANY



ARD – DAS ERSTE

ARD (full name: Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland – Consortium of public broadcasters in Germany) is a joint organization of Germany's regional public-service broadcasters. Together with ZDF, ARD is running the children's programme channel K.I.K.A., an „event“ / current affairs and documentary channel PHOENIX and together with the French TV production house ARTE France, the European cultural programme ARTE. 3sat is jointly run by ZDF, SRG, SSR idé suisse and ARD. Within the programme ARD Digital, ARD broadcasts the additional programmes EinsExtra, EinsPlus and EinsFestival.

Association of various regional channels
– 1st Channel
Secretariat General
Schiffbauer Damm 40
D-10117 Berlin

degeto@degeto.de
+49-69-15 09 349

www.DasErste.de

Rainer Flaskamp
Commissioning Editor
0049 69 15090

GERMANY



ZDF – ZWEITES DEUTSCHES FERNSEHEN

ZDF-Strasse 1
D – 55100 Mainz

www.zdf.de

Zweites Deutsches Fernsehen (English: "Second German Television"), ZDF, is a public-service German television broadcaster based in Mainz (Rheinland-Pfalz). It is run as an independent non-profit institution, which was founded by all federal states of Germany (Bundesländer). ZDF is financed by television licence fees and advertising revenues. [1] The ZDF is well known for its famous TV formats *heute* (newscast; established in 1963) and *Wetten, dass..?* (entertainment show; established in 1981). [2] Thomas Bellut, the current director general, was elected by the ZDF Television Council in 2011.

Wolfgang Bergmann
Acquisitions
Spielfilm-Leitung@zdf.de
0049 6131 7012110

Gabriele Weyand
Commissioning Editor
0049 6131 7012110

GERMANY



3SAT

3sat is the common full programme by the four public broadcasters ZDF and ARD from Germany, the ORF from Austria and the SRG SSR (Swiss television), completely without advertising slots.

c/o ZDF
55100 Mainz

T: 0049/6131/70-0
info@3sat.de

www.3sat.de

Dr. Jane Rusel
Project Manager Acquisition 3sat and digital channels
Jane.Rusel@zdf-enterprises.de
06131-991-1520

Inge Classen
Director Film 3sat
classen.i@zdf.de
filmredaktion@3sat.de
06131/70 2197

GERMANY



BR – BAYERISCHER RUNDFUNK

Bayerischer Rundfunk is Bavaria's public broadcasting service with two television programmes which reach most of Western Europe. As part of the ARD network, BR makes a significant contribution to the five main national ARD TV channels in Germany. Feature films and documentaries are a priority.

Rundfunkplatz 1
80335 München

T: 0049/89/59 00-01

www.br-online.de

Walter Greifenstein
Commissioning editor
walter.greifenstein@brnet.de

Hubert von Spreti
Executive commissioning editor
hubert.vonspreti@brnet.de

GERMANY



MDR - MITTELDEUTSCHER RUNDFUNK

Kantstr. 71-73
04275 Leipzig

www.mdr.de

The MDR is a public, terrestrial broadcaster based in Leipzig. Belonging to the ARD-consortium of public broadcasting stations, the rbb contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes for Saxony, Saxony-Anhalt and Thuringia.

Martina Faust
Film Acquisitions
Martina.Faust@mdr.de

Jana Brandt
Head of Films
jana.brandt@mdr.de
+49 341 30 0 7815

GERMANY



RBB - RUNDFUNK BERLIN-BRANDENBURG

located in Berlin:
Masurenallee 8-14,
14057 Berlin
info-berlin@rbb-online.de

located in Babelsberg:
Marlene Dietrich-Allee 20, 14482 Potsdam
info-brandenburg@rbb-online.de

www.rbb-online.de

Cooky Ziesche
**Commissioning Editor – Head of
Film/Cinema/Coproduction and
University Projects**
Cooky.ziesche@rbb-online.de
+49.30.979 93 24 100

GERMANY



NDR – NORDDEUTSCHER RUNDFUNK

Hugh-Greene-Weg 1
22529 Hamburg

T: 0049/40/41 56-0
F: 0049/40/44 76 02
nrd@nrd.de

www.nrd.de/home/index.html

Christian Friedrichs
Head of Programme Acquisition
cfriedrichs@studio-hamburg.de
+49 40 6688-5124

Karen Matthiesen
CE TV movie and feature film
k.matthiesen@nrd.de
+49 40 4156 5793

GERMANY



WDR – WESTDEUTSCHER RUNDFUNK

Appellhofplatz 1
50667 Köln

www.wdr.de

The WDR is a public broadcaster based in Cologne. Belonging to the ARD-consortium of public broadcasting stations, the WDR contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes. The WDR Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

Michael André
Commissioning Editor
michael.andre@wdr.de
0049/221/2 20-38 05

GERMANY



SWR

SÜDWESTDEUTSCHER RUNDFUNK

Funkhaus Stuttgart
Neckarstraße 230
70190 Stuttgart

T: 0711/ 929-0
F: 0711/ 929-12600
info@swr.de

www.swr.de

SWR is a regional public broadcasting corporation serving the southwest of Germany. The corporation has main offices in three cities: Stuttgart, Baden-Baden and Mainz. It is a part of the ARD consortium. It broadcasts on two television channels and six radio channels, with its main television and radio office in Baden-Baden and regional offices in Stuttgart and Mainz. It is (after WDR) the second largest broadcasting organization in Germany. SWR, with a coverage of 55,600 km², and an audience reach estimated to be 14.7 million. SWR employs 3,700 people in its various offices and facilities.

Martina Zöllner
Head of Film and Culture

GERMANY



SAARLÄNDISCHER RUNDFUNK

Funkhaus Halberg
66100 Saarbrücken

T: 0049/681/6 02-0
F: 0049/681/6 02-38 74
info@sr-online.de

www.sr-online.de

Dr. Hans-Günther Brüske
Head of Programm

Saarländer Rundfunk (Saarland Broadcasting - SR) is a public radio and television broadcaster for the German Bundesland (State) of Saarland, with its headquarters in the Broadcasting House Halberg in Saarbrücken. SR is a member of the ARD consortium.

GERMANY



HR – HESSISCHER RUNDFUNK

Anstalt des öffentlichen Rechts
Bertramstr. 8
60320 Frankfurt

069 / 155-1

www.hr-online.de

The HR is a public broadcaster based in Frankfurt. Belonging to the ARD-consortium of public broadcasting stations, the hr contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes.

Liane Jessen
**Executive area television play and
feature films**
ljessen@hr-online.de
0049 69 / 155-2357

Jörg Himstedt
Commissioning Editor
jhimstedt@hr-online.de
+49 69 1552552

GERMANY



RTL TELEVISION GMBH

Picassoplatz1
D-50679 Köln

[www.rtl-television.de](http://www rtl-television de)
[www.rtl.de](http://www rtl de)

RTL Television is Germanys leading private broadcaster among young viewers (14 to 49 years) and the general public alike. RTL features a strong line-up with highlights in all genres including big entertainment, factual entertainment formats, popular US series, the most popular german daily soap "Gute Zeiten, schlechte Zeiten" (Good Times, Bad Times), fiction formats like the action series „Alarm für Cobra 11“, comedy shows, news programmes like „RTL Aktuell“ and live sporting events such as the Formula 1. RTL Television is part of the The Media Group RTL Germany, one of the leading media companies in Germany.

Barbara Thielen
Head of Fiction
barbara.thielen@rtl.de

Tom Beyer
**Acquisitions Executive Feature Film
Department**
Tom.beyer@rtl.de
+49 221-456-72501

GERMANY



VOX TELEVISION

VOX belongs to the RTL-network and doesn't broadcast its own motion picture productions. RTL is also the purchaser for VOX motion picture.

Picasso-Platz 1
50679 Köln

www.vox.de

Joachim Moczall
Commissioning Editor
Joachim.moczall@vox.de

Sophia Dauber
**Commissioning Editor Feature Film
and TV Series Department**
sophia.dauber@vox.de
+49 221-456-83403

Patricia Marras
**Junior Commissioning Editor Feature
Film and TV Series Department**
patricia.marras@vox.de
+49 221-456-83402

GERMANY



PROSIEBEN / SAT.1

Free-TV-private channel in a network; part of the German channel network
ProSiebenSat1 TV Deutschland GmbH (company of the ProSiebenSat1 Media AG).

ProSieben Television GmbH & SAT.1
Satelliten Fernsehen GmbH
Medienallee 7
85774 Unterföhring

www.ProSiebenSat1.com

Rüdiger Böss
Senior VP Group Programming Acquisitions
ruediger.boess@prosiebensat1.com
+49(0)89-9507-1226

Michael Miesbach
Senior Manager Group Programming Acquisitions Commissioning Editor
michael.miesbach@prosiebensat1.com
+49(0)89-9507-1225

Angeli Agethen
Senior Manager Group Programming Acquisitions
angeli.agethen@prosiebensat1.com
+49(0)89-9507-1235

Jochen Ketschau
Senior VP German Fiction & Coproduction
Jochen.Ketschau@prosiebensat1.com
+49-89-95072351

Christian Balz
Commissioning Editor German Fiction + Coproduction
Christian.Balz@prosiebensat1.com
+49-89-95071356

Sigrid Egger
Senior Manager Group Programming Acquisitions Commissioning Editor
sigrid.egger@prosiebensat1.com
+49(0)89-9507-1236

Edda Sonnemann
VP German Fiction SAT.1 & Coproduction
Edda.Sonnemann@prosiebensat1.com
+49-89-95071350

Birgit Brandes
Commissioning Editor German Fiction + Coproduction
Birgit.Brandes@prosiebensat1.com
+49-89-95071346

GERMANY



Wolfgang Oppenrieder
Commissioning Editor German
Fiction + Coproduction
Wolfgang.Oppenrieder@prosiebensat1.com
+49-89-95071243

Patrick N. Simon
Commissioning Editor German
Fiction + Coproduction
Patrick.Simon@prosiebensat1.com
+49-89-95072353

Yvonne Weber
Commissioning Editor German
Fiction + Coproduction
Yvonne.Weber@prosiebensat1.com
+49-89-95071340

Thomas Biehl
Commissioning Editor German
Fiction + Coproduction
Thomas.Biehl@prosiebensat1.com
+049-89-95072343



GERMANY



KABEL EINS

Medienallee 7
85774 Unterföhring

www.kabeleins.de

Kabel eins is a private TV channel of the channel network ProSiebenSat1. The programme mainly consists of bought motion feature films and series. Only the entertainment formats with daily news, report-magazines and documentary broadcastings are produced by the channel or by order. Furthermore, the programme contains broadcasts from culture to science to entertainment and appeals to older target groups.

Rüdiger Böss
Senior VP Group Programming
Acquisitions
ruediger.boess@prosiebensat1.com
+49(0)89-9507-1226

Angeli Agethen
Senior Manager Group Programming
Acquisitions
angeli.agethen@prosiebensat1.com
+49(0)89-9507-1235

Michael Miesbach
Senior Manager Group Programming
Acquisitions Commissioning Editor
michael.miesbach@prosiebensat1.com
+49(0)89-9507-1225

Sigrid Egger
Senior Manager Group Programming
Acquisitions Commissioning Editor
sigrid.egger@prosiebensat1.com
+49(0)89-9507-1236

GERMANY



TELE 5

Bavariafilmplatz 7
82031 Grünwald

www.tele5.de

TELE 5 is a national Free-TV channel that addresses all viewers with a broad fictional programming of feature films, series and docu-fiction. As a subsidiary of the Tele Munich Group (TMG), TELE 5 has access to their programme catalogue with German - speaking TV rights to more than 5000 feature films, TV movies and mini-series. Additional acquisitions from major studios and independent distributors complement the versatile movie- and series programme.

Thomas Friedl
Director of Programming
thomas.friedl@tele5.de

Renate Müller
**Programming department feature
films**
Renate.mueller@tele5.de
+49 89/64 9568-207

GERMANY



KIKA

Der Kinderkanal von ARD und ZDF
Gothaer Straße 36
99094 Erfurt

www.kika.de

Childrens television channel operated jointly by ARD network and ZDF, series, feature films, magazines, documentaries, news and current affairs programs, specialties and programming days dedicated to topical issues, in-house productions, live broadcasts, numerous first broadcasts, as well as classics of children's programs produced by ARD and ZDF. Offering a large variety of high-quality, target-group-oriented programs free from commercials, for children aged three to thirteen.

Sebastian Debertin
Head of Fiction, Acquisition & Co-production
sebastian.debertin@kika.de
0361/2181869

Stefan Pfäffle
Deputy Head of Fiction, Acquisition & Co-production
stefan.pfaeffle@kika.de
0361/2181742

GERMANY



SKY DEUTSCHLAND FERNSEHEN GMBH & CO. KG

Medienallee 26
85774 Unterföhring

+49 89 995802
+49 89 99586239
info@sky.de

www.sky.de

Rainer Ingber
**Vice President Program Acquisition
& Adm**

Sky Deutschland AG, branded as Sky, is a German media company which operates a Direct Broadcast Satellite Pay TV platform in Germany, Austria and Switzerland (through Teleclub) offering a collection of basic and premium digital subscription television channels of different categories via Satellite and Cable Television. 21st Century Fox owns 54.5% of Sky Deutschland; the remaining shares are owned by diverse shareholders.

GERMANY



ICELAND

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

All along since the establishment of Icelandic TV in 1966 the major characteristics of the programming is its high percentage of foreign origin. Iceland is a small language community and local production is far more expensive than the price of foreign material. However, local production has developed, both in numbers and quality. In 20 years, 1995-2008, the three main channels, RUV, Stöd 2 and Skjárrinn, almost doubled their production time, from 1.800 hours in 1995 up to 3.500 hours in 2008. The combined local productions remained around 25% of the transmissions.

At present there are ten national channels. New technology, the arrival of specialized channels and not least condensation in the marketplace make this possible. Icelandic channels with some own programming at the end of year 2009 were as follows. (Years of founding in parenthesis): RUV Sjónvarp (1966), Stöd 2 (1986), Omega (1992), Stöd 2 Sport (1995), N4 (1997), Stöd 2 Bíó (1998), Stöd 2 Extra (1998), Skjár 1 (1998), ÍNN (2007), Nova TV (2008).

The archrivals on the market are RUV and Stöd 2. General channels with varied programmes are RUV, Stöd 2 and Skjár 1. The other seven are more or less specialized channels that mostly try to care for the interests of certain audience groups. All but one are transmitted from Reykjavík, the capital of Iceland. N4 is based in Akureyri, “the capital of the North”.

Only four years after the dawn of digital transmissions in Iceland late 2005, six of every ten households in the country had access to a digital receiver. Audiences can tune in to lots of foreign television channels distributed by seven different companies, mostly telecoms, either through cable or antenna. Since 2005 video on demand (VoD) has been offered by some of the telecoms.



Both of these images are from *The Cliff (Hamarinn)*, 2009. Production Company: Pegasus.

ICELAND



RIKISUTVARPID, RUV

Efstaleiti 1,
103 Reykjavík
Iceland.

T: (+354) 515 3000
F: (+354) 515 3010
istv@ruv.is

www.ruv.is

Rikisutvarpid, RUV, The Icelandic National Broadcasting Service, is a public service broadcaster owned by the Icelandic state. RUV is financed by state funding and revenues from advertisements. RUV's income can only be allocated for broadcasting purposes. RUV's television network reaches 99,9% of households; market share in viewing throughout 2010 was 51,7% for RUV TV. According to the Broadcasting Act the main obligation of RUV is to promote the Icelandic language and history as well as Iceland's cultural heritage.

Gudrun Helga Jonasdottir
Acquisition
gudrunhj@ruv.is
+354 515 3000

Skarphedinn Gudmundsson
Director of programming
skarpi@ruv.is

ICELAND



ITC SKJARINN

Skipholt 31,
105 Reykjavik,
Iceland.

T: +354 595 6000

www.skjarinn.is

ITC Skjarinn is an independent media company which divides into four different media units. The cable service distributes over 60 foreign cable channels including DR1, Discovery, BBC World News and more. The VOD service offers the largest VOD service via IPTV in Iceland. Screen One is a pay TV channel financed by subscription fees and advertising revenue. Its main programming needs are scripted dramas and high quality entertainment content. Screen One also produces its own local programming. Screen One also produces its own local programming, both scripted and entertainment.

Palmi Gudmundsson
Head of Programming
palmi@skjarinn.is

Berglind Osk Kjartansdottir
Assistant to Head of Programming
berglind@skjarinn.is

ICELAND



STÖÐ 2 (CHANNEL 2)

Skaftahlid 24,
105 Reykjavík,
Iceland

T: +354 512 5000

www.stod2.is

Saevar Hreidarsson
**Director of programming and
acquisitions**
saevar@365.is

Stöð 2 (Channel 2) is an ad-supported subscription TV channel founded in 1986. On average 45% of Icelandic households subscribe to Stöð 2. Stöð 2 is a part of 365 Media, Iceland's leading media company. Stöð 2 offers a selection of the world's highest rated TV shows, award-winning series, latest Hollywood blockbuster features, the most popular local programming, scripted and non-scripted as well as daily local news and news related programming. As a brand Stöð 2 operates several other subscription channels including two sports channels and a movie channel.

ICELAND



IRELAND

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

In Ireland the national public service broadcaster remains the strongest player in the TV market while British channels and companies continue to play an important role. The public service channels, RTÉ1 and RTÉ2, had a combined market share of 33.1% in 2010 (almost 5% less than in 2006). The private channel, TV3 (launched in 1998) had a 12.4% market share, and is now the second most popular channel. The other two national Irish broadcasters are the public service Irish language channel TG4, and the entertainment channel 3e (owned by TV3). The five most popular UK channels are ranked in the following order: BBC1, UTV, S4C, BBC2, and Sky 1 (with a combined share of 15.1% in 2010). With the launch of DTT services, the public service broadcaster has also launched additional digital channels (Audience data source: Eurodata TV / AGB Nielsen Media Research)

The introduction of DTT in Ireland was long delayed but is finally under way since the end of 2010. The Broadcasting Authority of Ireland announced in August 2010 that commercial DTT has been ruled out for the time being, but the tender for the Multiplexes may be re-launched in 2013 after switch-off. The multiplexes of the PSB RTÉ were launched in October 2010 as a trial, with the full service "Saorview" launched in May 2011. The total offer now includes the channels RTÉ 1, RTÉ 2, TV3, 3e, TG4, and RTÉ News Now. New services launched by the PSB are the following: RTÉjr (children) RTÉ One + 1, RTÉ Aertel Digital (teletext), and a trial HD service. Switch-off is planned for October 2012.

The Broadcasting Act of 2009 consolidated all previous broadcasting legislation. The Act also established the new broadcasting regulatory authority (the Broadcasting Authority of Ireland – BAI, which merged the Broadcasting Commission of Ireland (BCI) and Broadcasting Complaints Commission (BCC). The BAI was officially launched in October 2009 and now also has responsibility for the regulation of public service broadcasters in Ireland.



Trivia, 2010 – Production Company: Grand Pictures. Developed with the support of the MEDIA Slate Funding scheme.

IRELAND



Raidió Teilifís Éireann, (*Radio [and] Television of Ireland*; abbreviated as RTÉ) is a semi-state organization and the public service broadcaster of Ireland. It both produces programmes and broadcasts them on television, radio and the internet. RTÉ operates two free-to-air television channels, RTÉ One and RTÉ Two. RTÉ One is the main channel providing a comprehensive range of home-produced Irish factual, entertainment, drama and lifestyle programming, which is complemented by selected acquired material. RTÉ Two is a mixed-genre channel appealing to a variety of audiences across the schedule. During daytime its primary focus is children and sports; in the evening it targets viewers of a young mindset with innovative drama, entertainment and key acquisitions.

Donnybrook
Dublin 4
Ireland

T: +353 1 208 3111
F: +353 1 208 3080
info@rte.ie

www.rte.ie

Jane Gogan
Commissioning Editor, Drama
drama@rte.ie

Dermot Horan
Director of Broadcasting & Acquisitions
dermot.horan@rte.ie

IRELAND



TG4 (Irish: TG Ceathair or TG a Ceathair) is a public service broadcaster for Irish-language speakers. The channel has been on-air since October 31, 1996 in the Republic of Ireland and since April 2005 in Northern Ireland. The daily Irish language programme schedule is its core service: seven hours of programming in Irish supported by a wide range of material in other languages such as French and English.

Baile na hAbhann
Co. Galway
Ireland

T: +353 91 505050
F: +353 91 505021

www.tg4.ie

Mícheál Ó Meallaigh
Senior Commissioning Editor
micheal.o.meallaigh@tg4.ie

Proinsias Ní Ghráinne
Commissioning Editor
proinsias.ni.ghrainne@tg4.ie

Lís Ní Dhálaigh
Acquisitions & Output Director
lis.ni.dhalaigh@tg4.ie

Deirbhile Ní Churraighín
Acquisitions Executive
deirbhile.ni.churraighin@tg4.ie

Máire Ní Chonlán
Commissioning Editor
maire.ni.chonlain@tg4.ie

IRELAND



TV3

TV3 is a commercial free-to-air television broadcaster in the Republic of Ireland and Northern Ireland which launched on September 20, 1998. It was the country's first independent commercial broadcaster. TV3 is operated by the TV3 Group which also consists of television channel 3e and the online service tv3.ie

Westgate Business Park
Ballymount
Dublin 24

T: +353 1 4193333
info@tv3.ie

Jeff Ford
Director of Content
jeff.ford@tv3.ie

IRELAND



ITALY

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Italy's two most watched channels are still RAI Uno, the first public channel, and the private channel Canale 5 (Mediaset), which had daily audience market shares of 20.7 and 18.8% respectively in 2010. RAI broadcasts more than twenty channels in Italy and five international channels. In May 2010, it absorbed its subsidiary Raisat and the Raisat channels were all renamed. In 2010, all the RAI channels regained a 0.6% market share while the three general entertainment channels of the Mediaset group (Canale 5, Italia 1 and Rete 4) lost 2.7%. Apart from the seventh terrestrial analogue channel La 7, with a stable market share of around 3%, and the children's channel Boing TV (Mediaset group), no channel has a daily audience share of more than 1% in Italy. The incumbent terrestrial general-interest channels still pull in nearly 75% of viewers. (Audience data source : Eurodata TV Worldwide / Auditel / AGB Nielsen Media Research Italy).

This concentration of audience share is all the more surprising in Italy as the country has a large number of channels: there are more than 400 national and nearly 600 regional and local channels. The leading channel operators are the public service broadcaster RAI and the private groups Mediaset and News Corporation, whose subsidiary Sky Italia became the leading Italian television group by operating revenue in 2010.

The Mediaset group controls 42 Italian channels (including one international channel). It also has assets in Spain: in addition to the channel Telecinco, it took control of Cuatro in 2010 and acquired a 22% stake in the satellite operator Digital+. In Tunisia, it has a stake in the channel Nessma TV.

Through its subsidiaries Sky Italia and Fox Italia, News Corporation operates more than 90 channels in Italy, 25 of them targeting other countries. The subsidiary Fox International also broadcasts channels to Germany, Benelux and the Baltic countries.



Dieci Inverni, 2009 – Production Company: Raicinema

ITALY



Rai 1 is the flagship television station of RAI, Italy's national public service broadcaster, and the most watched television channel in the country. Rai 2 is one of the three main television channels broadcast by Italian public television company RAI alongside with Rai 1 and Rai 3. Rai 3 is the third channel of Rai and it offers many public service programmes. Rai Movie, launched in 2003 as RaiSat Cinema World and re-badged in 2006 as RaiSat Cinema, on May 18, 2010 the channel has been re-launched as Rai Movie. It broadcasts mostly Italian films, interviews, backstages and documentaries. Rai 4 is an entertainment television channel, programming includes films, TV series and cartoons. Rai 5 has replaced Rai Extra. It broadcasts programs about art, fashion, dance, opera, theatre, cuisine, travel, documentary films and TV Drama..

Piazza Adriana, 12
00193 Roma
Italy

T: 0039 06 684701

www.raicinema.it

Guido Pugnetti
Head of acquisitions
guido.pugnetti@raicinema.it

Marina Chiaravalle
Buyer
marina.chiaravalle@raicinema.it

Cesare Genolini
Buyer
cesare.genolini@raicinema.it

ITALY



Canale 5 is a classic generalist channel, aimed at the mass family audience. Italia 1 is the Mediaset Group's youngest channel, paying particular attention to the tastes of its audience. Retequattro: offers programmes of traditional shows, much appreciated by women viewers, with programmes aimed at a male audience. Mediaset Italia 2 is a channel dedicated to younger male viewers: TV series, sitcoms, cult cartoons and sports and music programmes. Mediaset Extra is a new thematic channel that offers a selection of archive and current entertainment programmes from the Mediaset network. La5 is the free digital terrestrial channel that offers scheduling dedicated to a modern feminine audience. Iris is a thematic channel dedicated to quality films, although it also broadcast programmes about cinema news, film stars and the most important film festivals

Via Aurelia Antica 422
00165 Roma

T: 0039 06 66390566
F: 0039 06 6639 0650
internationalsales@mediaset.it

www.mediasetdistribution.com

Clare McArdle
International sales manager
Clare.mcardle@mediaset.it

Andrea Goretti
general manager rights
segreteriadirezionediritti@mediaset.it

Giorgio Giovetti
head of sales department
giorgio.giovetti@mediaset.it

Manuela Caputi
international sales manager
Manuela.caputi@mediaset.it

ITALY



SKY ITALIA SRL

Via Monte Penice 7
20138 Milano
Italy

T: +39 02 308017269

www.sky.it

Giovanna Milone
Buyer
giovanna.milone@skytv.it
+39 02 308012266

Luca Pelusi
Buyer
luca.pelusi@skytv.it
+39 02 308017510

Sky Italia S.r.l. is an Italian digital satellite television platform owned by News Corporation launched on 1st August 2003, when the former platforms Tele+ (Canal+) and Stream TV (News Corporation and Telecom Italia) merged together. It is similar in many ways to BSkyB's Sky Digital in the United Kingdom and Ireland, and like that network it is a major sports broadcaster

ITALY



LA7 S.R.L.

La7 and La7d are private television channels and they are owned by Cairo Communications. Their programmes are typically oriented to information, films, entertainment and sport.

Via della Pineta Sacchetti 229,
00168
Roma

T: +39 0635584228

www.la7.it

Francesco Valle
Acquisition Executive

ITALY



LA EFFE TV

La EffeTv is a media company of Gruppo Feltrinelli. The show schedule is characterized by information, culture and entertainment, among which Cinema and TV Series.

Via Andegari, 6
20121 Milano

T: +39 02 725 721

www.laeffe.tv

Riccardo Chiattelli
Head of Content and Communication
riccardo.chiattelli@feltrinelli.it

ITALY



NETHERLANDS

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The most important players in the Dutch market are the public broadcasters, with the national channels Ned 1, Ned 2, Ned 3, and all the digital channels grouped together under the Ned 24 banner, as well as the RTL group, whose channels RTL 4, RTL 5, RTL 7, RTL 8 and RTL Lounge are transmitted under Luxembourg law. The third provider, SBS Broadcasting (NET 5, SBS 6 and Veronica), was sold by ProSiebenSat.1 Media AG in May 2011 to Joop de Mol's Talpa Media group, which is associated with the Finnish group Sanoma.

In 2010, the daily audience share of Ned 1 rose by 1.5%, thus enabling the channel to reach 21.5%, which was higher than the figure posted in 2008. Following the public channel in audience share terms are the private channels RTL4 and SBS6 with 14.4 and 10% respectively. Their market shares have actually risen in the past two years. The two other public channels (Ned 2 and Ned 3) each have a daily share of slightly under 7%, while the figure for the four private channels - NET 5, RTL 7, RTL 5 and Veronica - is between 3 and 5%. Eight other channels have a daily audience of between 1 and 2%. (Audience data source: Eurodata TV Worldwide / Stichting Kijkspreker).

The Dutch public service broadcasting system is made up of some twenty national and 350 local broadcasters. On 16 December 2010 the General Court of the European Union handed down a decision in an action for annulment brought by the Netherlands and the Dutch Broadcasting Foundation - NOS, a public service broadcaster, regarding state aid for the latter. After receiving complaints by several Dutch commercial broadcasters, the Commission initiated an investigation regarding the funding of public service broadcasters in the Netherlands. It concluded EUR 76.327 million, plus interest should be repaid by NOS.



Annie MG, 2009 – Production Company: BosBros, with co-producers the broadcasters VRT, VARA & NPS



Het Gordijnpaleis van Ollie Hartmoed produced by Lemming Film co-produced by Willy Waltz (NL), A Private View (BE) and broadcaster VPRO, VRT. Developed with the support of the MEDIA Programme (Slate Funding). Released December 2011

NETHERLANDS



AVRO

PO Box 2
1200 JA Hilversum
The Netherlands

T: +31(0)35 671 7911
communicatie@avro.nl

www.avro.nl

Simone van den Ende
Head of Arts&Culture and Drama
simone.vandenende@avro.nl

NETHERLANDS



BNN is a Dutch public broadcasting association supported by the Netherlands Public Broadcasting, and targets teenage and young adult audiences. It produces entertainment and informative television programs, radio programs, and feature films.

PO Box 646
1200 AP Hilversum
The Netherlands

T: +31 (0)35 655 5333
F: +31 (0)35 655 5335
bnn-info@bnn.nl

www.bnn.nl

Mark Furstner
mark.furstner@bnn.nl
+31(0)35 655 5333

NETHERLANDS



EO is financed by the Dutch government. It transmits on Nederland 1, 2 and 3 which are national channels that transmit by cable and terrestrial network.

PO Box 21000
1213 AC Hilversum
The Netherlands

+31(0)35 647 4747
eo@eo.nl

www.eo.nl

Jacomien Nijhof
**Commissioning Editor Drama and
Innovation**
jacomien.nijhof@eo.nl

NETHERLANDS



HUMAN

The Humanistische Omroep (HUMAN) is one of the smaller public broadcasting organizations in the Netherlands. It is a public service association. HUMAN produces programmes for Dutch television, makes radio talkshows and interactive websites.

PO Box 135
1200 AC Hilversum
The Netherlands

+31(0)35 672 2020
secretariaat@human.nl

www.human.nl

Kees Vlaanderen
Commissioning Editor Drama
kees.vlaanderen@human.nl

NETHERLANDS



KRO

KRO is one in the group of 9 biggest broadcasting associations in the Netherlands, and is financed by licence fees and advertising. KRO transmits on Nederland 1, 2 and 3 which are national channels, that transmit by cable and terrestrial network.

PO Box 23000
1202 EA Hilversum
The Netherlands

+31(0)35 671 3911
kro@omroep.nl

www.kro.nl

Brigitte Baake
Commissioning Editor Drama
drama.cultuur.tv@kro.nl

NETHERLANDS



NCRV is one in the group of the 9 biggest broadcasting associations in the Netherlands, and is financed by license fees and advertising. NCRV transmits mainly on Nederland 2, which is a national channel that transmits by cable and terrestrial network.

PO Box 25000
1202 HB Hilversum
The Netherlands

T: +31 (0)35 671 9911
webmaster@ncrv.nl

www.ncrv.nl

Gemma DerkSEN
Commissioning Editor Drama
gemma.derkSEN@ncrv.nl

NETHERLANDS



OMROEP MAX

Omroep MAX is a station broadcast in The Netherlands. MAX's programming focuses on people aged 50 years and older. MAX transmits on Nederland 1 and Nederland 2.

PO Box 518
1202 BA Hilversum
The Netherlands

+31(0)35 677 5409
info@omroepmax.nl

www.omroepmax.nl

Mascha van Erven
mascha.van.erven@omroepmax.nl

NETHERLANDS



NTR is the independent Dutch public service broadcaster specialising in information, education and culture. NTR's themes are based on the statutory duties of the three public service broadcasters which in 2010 merged into NTR: NPS, Teleac and RVU.

PO Box 29000
1217 GP Hilversum
The Netherlands

T: +31(0)88 100 3100
F: +31 (0)88 100 3138
publiek@nps.nl

www.ntr.nl

Marina Blok
Commissioning Editor Drama
marina.blok@ntr.nl

NETHERLANDS



VARA

The Omroepvereniging VARA (VARA Broadcasting Association) is a Dutch public broadcasting association operating within the framework of the Nederlandse Publieke Omroep system.

PO Box 175
1200 AD Hilversum
The Netherlands

+31(0)35 671 1911
drama@vara.nl

www.omroep.nl/vara

Robert Kievit
Commissioning Editor Drama
robert.kievit@vara.nl

NETHERLANDS



VPRO is one in the group of the 9 biggest broadcasting associations in the Netherlands. It is financed by license fees and advertising. There are 3 public channels in the Netherlands that transmit by free cable, free satellite, free terrestrial and free digital television. VPRO can be found on all 3 channels.

PO Box 11
1200 JC Hilversum
The Netherlands

T: +31(0)35 671 2911
F: +31(0)35 671 2100
info@vpro.nl

www.vpro.nl

Joost de Wolf
Commissioning Editor Drama
j.de.wolf@vpro.nl

NETHERLANDS



NORWAY

The audience of the three public channels of the group NRK increased anew their share in 2011, with a daily audience market share of 41.1% versus 37.5% in 2008. Nonetheless, the channel NRK1, with 30.1%, is still ahead. The group TV 2 and its 5 channels had a combined market share of 25.3%, with TVNorge (ProSiebenSat.1 Media AG) trailing behind with 7.6% and TV3 (Modern Times Group) with 5.1%.

TV3 (MTG), Viasat 4 (MTG) and The Voice TV (ProSiebenSat.1 Media AG) are established in the United Kingdom, requiring them to comply with the Audiovisual Media Services Directive (AVMSD) but not with specific provisions under Norwegian legislation, particularly in respect of programming and advertising.

Several new channels have emerged in the Norwegian market since 2008. For example, Frikanalen, which was launched in October 2008, started broadcasting on the national digital terrestrial television network in 2009. This is an open, non-commercial channel and is owned by around sixty non-governmental organisations. The latest addition is the video gaming channel Ginx TV which signed a distribution agreement with Canal Digital Kabel TV in November 2012.

Norwegian cable television networks are among the most modern in Europe. Just under half of all households subscribe to a cable television service. Norway's two main cable operators are Canal Digital (Telenor) and Get. About a third of households prefer to subscribe to a satellite TV service. As in the other Nordic countries, there are two platforms competing in this market: Canal Digital (Telenor) and Viasat (MTG). Finally, a growing number of homes have chosen to subscribe to an IP protocol TV (IPTV) service. In a country where around 80% of homes have broadband Internet access, the sector is developing apace and includes several competing services: Altibox, Comvie, FastTV, Homebase, Lyse Energi, NextGen Tel or Telenor.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



Hellfjord: Produced by Tappeluft Pictures with the support of the MEDIA TV
Broadcasting scheme.

NORWAY



NRK NORSK RIKSKRINGKASTING (THE NORWEGIAN BROADCASTING CORPORATION)

Bj. Bjørnsons Plass 1
0340 Oslo
Norway

T: +47 23 04 70 00
tone.ronning@nrk.no

www.nrk.no

Tone Rønning
Commissioning Editor
tone.ronning@nrk.no
+47 90967780

Norsk Rikskringkasting (The Norwegian Broadcasting Corporation) is the Norwegian government-owned broadcasting company. It is non-commercial and based on public service principles. NRK is the largest media organisation in Norway. It is a founding member of the European Broadcasting Union.

NORWAY



TV2 NORWAY

TV 2 is the largest commercial television station in Norway and the second largest TV station in Norway. TV 2 started to broadcast in 1992, based on a governmental license to broadcast national commercial terrestrial television.

Nøstegaten 72
Postboks 7222
5020 Bergen
Norway

T: +47 915 02255

www.tv2.no

Christopher N. Haug
Head of Drama
Christopher.Haug@tv2.no
+ 47 95 19 36 06

Rolf Wenell
Programme Director
rwe@tv2.no
+47 95 78 95 88

NORWAY



TV3 NORWAY

TV3 is a commercial television channel owned by Viasat broadcasting, part of (MTG) Modern Times Group.

Postboks TV3 Youngstorget
0028 Oslo
Norway

T: +47 22 99 00 33

www.tv3.no

Lars Olav Vartdal
Head of Formats and Development
Tv3/ Viasat 4
Lars.Olav.Vartdal@tv3.no
+47 90 59 62 96

Hilde Kollerød
Head of Schedule
Hilde.kollerod@tv3.no
+ 47 97 18 08 87

NORWAY



TVNORGE

TVNorge is Norway's second largest commercial channel and went on the air in 1988 as the first advertising supported channel in Norway. TVNorge is part of SBS Discovery Media a Nordic TV and radio network that also includes TV channels FEM, VOX, MAX, TLC and Discovery..

SBS Discovery Norway
Nydalens Allé 37
0484 Oslo
Norway

Nina Lorgen Flemmen
Head of Acquisitions
nina.lorgen.flemmen@sbsdiscovery.no
T: +47 21 02 20 24
M: +47 930 92 102

NORWAY



POLAND

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The most important free-to-air transmission players are still the public group TVP and the two private groups TVN (ITI group) and Polsat. The public channel TVP1 still heads the daily audience figures, with a 19.4% market share (compared with 24% in 2006). TVP2, the second public channel, lost more than 5% of its market share between 2006 and 2010. The two main private channels, TVN and Polsat, have seen their audiences dwindle: their market share in 2010 was 15.2% and 13.8% respectively (against 16.7% and 16.1% in 2006). (Audience data source: Eurodata TV Worldwide / AGB Nielsen Media Research).

Following these four channels, there were six that commanded between 1 and 5% of the audience share. The fragmentation of the audience is encouraging the most important groups, which see the audience of their main channels shrinking, to increase the number of special interest channels. For example in 2011, TVP has 9 national channels and 16 regional services, TVN directly provides 10 channels (and the ITI group controls 17), the group Polsat Cyfrowy has 14, as does the Canal+ Cyfrowy group (a subsidiary of the French group Vivendi). These groups are continuing to announce the establishment of new special interest channels.

After three years of discussions, an act amending the Broadcasting and Licence Fees was finally passed in August 2010.



POLSAT

Polsat is a television broadcaster-commercial station buying movies for all rights. The channel is also available to watch in Sweden. It is active 168 hours per week and free to watch. Polsat is the third national TV channel broadcast via the terrestrial analogue network, it covers more than 72% of the territory and 85% of the population (2006 data). It belongs to the Polsat group of channels. The schedule of Polsat is generalist.

Telewizja Polsat S.A.
ul. Ostrobramska 77
04-175 Warszawa
Poland

T: +48 22 514 53 00
biuro@polsat.com.pl

www.polsat.com.pl

Anna Kozanecka
**Head of Film Acquisition and
programming**
akozanecka@polsat.com.pl

Szymon Mioduszewski
Film Acquisitions Executive
s.mioduszewski@polsat.pl
+48 502 985 268

POLAND



TVP is a Polish public station, operating 2 nation-wide channels (TVP1, TVP2) a number of thematic channels: TVP Info, TVP Kultura, TVP Sport, TVP History, and a satellite channel TVP Polonia. Its main activity is in broadcasting, production, worldwide distribution and acquisition.

Telewizja Polska S.A.
ul. Woronicza 17
00-999 Warszawa
Poland

T: +48 (22) 547 8514
F: +48 (22) 547 8150
sekretariat@tvp.pl

www.tvp.pl

Ewa Dabrowska
Acquisition – Sales manager
ewa.dabrowska@tvp.pl
+48 22 547 7230

Wojciech Diduszko
Programme Buyer TVP Kultura
wojciech.diduszko@tvp.pl
+48 22 547 29 85

Tomasz Kolankiewicz
Programme Buyer TVP Kultura
tomasz.kolankiewicz@tvp.pl
+48 22 547 86 97

Beata Pacak
Programme, Film Buyer
beata.pacak@tvp.pl
+48 22 547 81 14

POLAND



CANAL PLUS

Established in 1995, Canal+ is a paid TV channel in Poland, Canal+. Programming of Canal+ focuses on feature films (hits, mega hits and premiere movies) and sport (soccer, motorcycle, racing, NBA and others).

Canal Plus Cyfrowy Sp. z.o.o
al. gen. W. Sikorskiego 9
02-758 Warszawa
Poland

T: +48 22 32 82 701
F: +48 22 32 82 750

www.canalplus.pl

Magdalena Błasiak
Director of Film Division
m.blasiak@cplus.com.pl
+48 22 32 82 848

Barbara Gołębiewska
VOD
b.golubiewska@cplus.com.pl
+48 22 32 82 903

Urszula Sassa
Shorts & concerts acquisitions
u.sassa@cplus.com.pl
+48 22 32 82 704

POLAND



HBO POLAND

HBO Poland is a paid television station which is movie oriented.

HBO Poland Sp. z.o.o
Ul. Pulawska 17
02-515 Poland

T: 0048 22 852 8800
kontakt@hbo.pl

www.hbo.pl

Aleksander Kutela
Senior vice president
a.kutela@hbo.pl

POLAND



TVN

TVN is a private TV station in Poland. Its principle activity is the producing of theatrical movies and TV series.

TVN S.A.
ul. Wiernicza 166
02-952 Warszawa

T: +48 22 8566060
tvn@tvn.pl

www.tvn.pl

Renata Męcina
Buyer
r.mecina@tvn.pl

POLAND



SPAIN

Hit by the economic crisis, the Spanish audiovisual market has undergone considerable change: for example, 2008 and 2009 saw developments in TV audience rankings, the reform of RTVE, a merger between Cuatro and Telecinco, a rapid increase in the number of special-interest channels, and the switchoff of analogue terrestrial transmissions.

The public channel TVE La Primera, which led the market in 2009 with a 16.4% daily audience share, confirmed this position in 2010 with a 16% share. It therefore overtook Telecinco, a private channel owned by the Italian Mediaset group, the market share of which has suffered a drop of more than six percentage points since 2006 and is now only 14.6%. Antena 3, controlled by the Planeta de Agostini and Bertelsmann groups, remained in third position but has also lost more than seven percentage points since 2006 and has seen its market share fall to 11.7%. Next, the two most recent additions to the Spanish analogue terrestrial landscape continued to establish themselves: Cuatro (which replaced Canal+ in 2005) with 7% and La Sexta (created by a Spanish-Mexican consortium in 2006) with 6.6%. TVE La 2 followed with a 3.1% daily audience share. The public television channels of the Autonomous Communities also recorded a significant decline: their total market share fell from 15.4% in 2006 to 11.2% in 2010. This decline in the incumbent channels can be explained by the rapid increase in the number of special-interest channels. The audience share of such channels, which was negligible in 2006, may now exceed 2%, as in the case of Antena.Neox or the Disney Channel. (Audience data sources: Eurodata TV Worldwide / Kantar Media)

In spring 2010, a new general law on audiovisual communications was adopted. Debated for six years, its provisions include the creation of a national regulatory authority, the Consejo Estatal de Medios Audiovisuales. This body was set up by a decree of 3 June 2011 but the Partido Popular has announced its intention to abolish it if it won the November 2011 parliamentary elections.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



ANTENA 3

Antena 3 is a private Spanish terrestrial channel. Its programming is generalist. When it was launched, Antena 3 was the first national private channel in Spain. It is controlled by Planeta de Agostini and RTL Group.

Avda. Isla Graciosa 13,
28703,
San Sebastian de los Reyes,
Madrid
Spain

T: 0034916230500

www.antena3.com

Mercedes Gamero
Director of Acquisitions and Sales
minigo@antena3t.es

Javier Iriarte Moreno
Programming Deputy Manager
minigo@antena3t.es

SPAIN



ARAGON TELEVISION

Aragon Television is the autonomous regional channel in Aragon.

Avda. María Zambrano 2,
50018 Zaragoza
Spain

www.aragontelevision.es

Jaime Fontan
**Head of Acquisitions and
Commissioning Editor**
gfontan@aragontelevision.es
+34876256500

SPAIN



CANAL 9 – TVV – TELEVISIÓN VALENCIANA

Radiotelevisió Valenciana,
Polígon Accés Ademús s/n;
46100 Burjassot, València
Spain

Canal 9-TVV is one of the six Spanish regional stations and was created in March 88 although it went on the air only in October 1989 broadcasting for the Valencian Community area covering a population of more than 5 million people in the provinces of Valencia, Castellon and Alicante as well as in the Balearic Islands. Canal 9-TVV broadcasts 6.600 hours yearly in Valencia and Castilian through two channel including in its schedule news, sports, current affairs, game shows, movies, series, sitcoms, animation, documentaries, music and entertainment. In-house production covers a 60% of the total broadcasting time and acquisitions are mainly made in the US, England, Japan, Australia.

T: 34 96 318 30 00
F: 34 96 318 34 82

www.rtvv.es

Antoni Fontelles
Head of Programming
fontelles@rtvv.es

Vicenta Suberviola Lloria
Programming and Acquisitions
Director
suber@rtvv.es
+34 96 318 30 00

SPAIN



CANAL EXTREMADURA TELEVISION

Sociedad Pública de Televisión Extremeña T: 0034924382000
S.A.U.
Avenida de las Américas,
11º 06800 Mérida [Badajoz]
Spain

Canal is an autonomous public channel of Extremadura. It is broadcast in Spanish with regional coverage and free access.

www.canalextremadura.es

Guillermo Sánchez Castaño
Head of Programmes
guillermosanchez@canalextremadura.es
+34924382000

SPAIN



CANAL SUR

Canal Sur is the main regional autonomous public channel of Andalusia.

Edificio Canal Sur. Avda.
José Gálvez, 1. CP 41092
Isla de la Cartuja,
Seville
Spain

T: 0034955054600

www.canalsur.es

Lidia Lorente
Acquisitions Executive
+34955054773

Fidel Cardete Quintero
Head of Programming

SPAIN



RTV CASTILLA LA MANCHA

CMT is the first public autonomous channel in Castilla-La Mancha.

c / Rio Alberche s.n.
Polígono Santa Ma de Banquerencia
Toledo
Spain 45007

T: +34925288600
F: +34925288618
info@rtvcm.es

www.rtvcm.es

Ramón Villaverde
Head Programming
ramonvillaverde@rtvcm.es
+34925287853

SPAIN



ETB1 – EUSKAL TELEBISTA

EITB is the first communication group of Euskadi. It has more than 25 years of experience in the communication world. During this time it has consolidated as a modern and efficient media that daily goes over to more than one million citizens, to whom it mainly offers information and entertainment.

T: +34946563000
F: +34946563095
info@eitb.com

www.eitb.com

Jesús Higuera
Head of Programming Acquisitions
Higueras_jesus@eitb.com

SPAIN



LA SEXTA – (TELEFILM)

La Sexta is a Spanish private terrestrial generalist channel. When it was launched in 2006, la Sexta became the sixth Spanish national terrestrial channel. La Sexta is controlled by the GAMP (which includes Mediapro) and the mexican group Televisa.

C/Virgilio nº2, Edificio 4
Ciudad de la Imagen
Pozuelo de Alarcón (Madrid)
Spain

T: +34 91 838 2966
F: +34 91 838 2958
info@lasexta.com
comunicacion@lasexta.com

www.lasexta.com

Enrique Iozano
Acquisitions Manager

Esperanza Martin
Programme Director

SPAIN



TELEVISIÓ DE CATALUNYA

Carrer de la TV3,
Sant Joan Despí, 08970,
Barcelona, Spain

T: +34 934 99 93 33
coproduccions@tv3.cat

www.tv3.cat

Susanna Jiménez
Head of Coproductions
+34934999333
coproduccions@tv3.cat

Televisió De Catalunya is an autonomous public channel of Catalonia. It is broadcast in Catalonia, with free access, in Catalan. Televisió De Catalunya deals with six different channels: TV3, 33, 3/24, Esports 3, Super 3, 3XL and TV3CAT.

SPAIN



TELECINCO – GESTEVISION

T: 0034913966999
telecinco@telecinco.es

www.telecinco.es

Ghislain Barois
Acquisitions Director
gbarrois@telecinco.es

Mónica Iturriaga
Acquisitions Manager
miturriaga@telecinco.es

Jorge Tuca
**Director of Development , Foreign
Distribution**
jt Luca@telecinco.es

SPAIN



TVE – TELEVISIÓN ESPAÑOLA

Prado del Rey
28223 Pozuelo de Alarcón (Madrid)
Spain

T: +34 91.346.80.00
F: +34 91.346.30.55

María Jesús Pérez
**Head of Acquisitions and
Commissioning Editor**
mjesus.perez@rtve.es

Televisión Española –TVE – is the national state-owned public service television broadcaster in Spain.

SPAIN



SWEDEN

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The main players in the Swedish broadcasting market are public broadcaster SVT, private Swedish groups Bonnier (TV4 and Nordic Canal+ channels) and Modern Times Group – MTG (TV3, TV6, TV8, Viasat Film and Viasat channels, some of which are broadcast from the United Kingdom), and the German group ProSiebenSat.1 Media AG, whose channels Kanal 5 and Kanal 9 are also transmitted from the United Kingdom.

In 2009, the public channel SVT1 regained its position as the most watched channel in Sweden, with an increased daily audience share of 20.9%, which it increased even further in 2010 (23.2%), ahead of TV4 (Bonnier), which remained below the 20% mark (19.2%) in 2010. SVT2, Sweden's second public channel, dropped to 6.9% (a market share that has virtually been halved in the space of four years) and lost third place in 2009 to TV3 (MTG) with 8.1%. It is followed by Kanal 5 (ProSiebenSat.1 Media AG) and TV6 (MTG), two established channels, and TV3, broadcast from the United Kingdom.

The combined audience share of these six main channels was only 69.4% in 2010, compared to almost 80% four years earlier. Due to this audience fragmentation, the broadcasting groups have increased their range of specialist channels. In terms of total audience share per group, the six SVT channels saw their market share fall from 39.3% in 2006 to 35.2% in 2010, in contrast to the nine TV4 channels, whose share rose from 26% to 31% in 2010. (Audience data source: Eurodata TV Worldwide / MMS Mediamätning | Skandinavien AB)

The main players in the distribution market remain the Swedish groups MTG, TeliaSonera and Teracom, as well as cable operator Com Hem and the Norwegian Telenor group.

The new Radio and Television Act entered into force on 1 August 2010, transposing the Audiovisual Media Services Directive (2007). The Act defines and regulates sponsorship, advertising and product placement. It also creates a new audiovisual regulatory body, Myndigheten för radio och tv (Swedish audiovisual authority), which replaces the radio and television authority (Radio- och TV-Verket, RTVV) and the Swedish audiovisual commission (Granskningsnämnden för radio och TV, GRN)



Drottningoffret (The Sacrifice), 2010 – Production Company: Bob Film. (Photographer: Johan Paulin)



Death of a Loved One 2013 - Production Company: Pampas Produktion (supported by the MEDIA TV Broadcasting scheme) (Photo: Svensk Filmindustri).

SWEDEN



SVERIGES TELEVISION (SVT)

Oxenstiernsgatan 26-34
105 10 Stockholm
Sweden

T: +46 8 784 00 00

www.svt.se

SVT is the Swedish public service broadcaster financed by a compulsory fee. They had 64 hours of broadcasting per day on all their channels. 26 % of the programming is fiction.

Stephen Mowbray
Head of Fiction acquisition
stephen.mowbray@svt.se

Henrik Palm
Buyer
henrik.palm@svt.se

Magdalena Löfström
Buyer
magdalena.lofstrom@svt.se

Agneta Perman
Feature Film Buyer / Co-production Executive
agneta.perman@svt.se

Helena Ingelsten
Buyer & Commissioning editor
Swedish Short films
helena.ingelsten@svt.se

Hanne Palmquist
Commissioning Editor Drama
hanne.palmquist@svt.se

Mette Friberg
Head of Drama, SVT Gothenburg
mette.friberg@svt.se

Christian Wikander
Head of Drama, SVT Stockholm
christian.wikander@svt.se

Stefan Baron
Co-production executive
stefan.baron@svt.se

SWEDEN



KANAL 5 / KANAL 9

Rådmansgatan 42
114 99 Stockholm
Sweden

T: 08-520 55 555

www.kanal5.se
www.kanal9.se

Katarina Eriksson
Head of Acquisition
Katarina.Eriksson@kanal5.se
+46852055150

Kanal 5 and Kanal 9 are part of ProSiebenSat1 media group and are transmitting from London. Kanal 5 has an entertainment and feature film profile. Kanal 9 is a series, feature film and documentaries as well as sports and events channel.

SWEDEN



TV4 / C MORE

TV4 Group started its transmissions in 1990. TV4 Group has a range of channels under the TV4 brand. C More (Previously known as Canal+) was started by French Canal+ in 1997 but is now owned by TV4. Canal More is a pay TV service with 15 channels

Tegeluddsvägen 3-5
115 79 Stockholm
Sweden

T: +46 8 459 40 00

www.tv4.se

Clara Scherman
Director of Acquisitions
clara.scherman@tv4.se
+46 8 459 4660

Helena Forman
Head of Acquired Programmes
helena.forsman@tv4.se
+46 8 459 4082

Maria Lidén
**Acquisitions Executive – Drama,
Comedy & Scripted programmes**
maria.liden@tv4.se
+46 8 459 4651

Bo Thörnwall
**Acquisitions Executive – Feature
Films**
bo.thornwall@tv4.se
+46 8 459 4665

SWEDEN



TV3 / TV6 / TV8 / TV10

TV3 started its transmissions in 1987 and was the first commercial channel in Sweden. It has an entertainment and feature film profile. TV6 has a profile of entertainment, sports and fact shows. TV8 has a focus on series and lifestyle. TV10 focuses on sports and documentaries. These channels are all owned by Viasat which is part of MTG (Modern Times Group).

MTG TV
PO Box 17054
SE-104 62 Stockholm
Sweden

T: +46 (0)8 56 20 23 00

www.mtgvtv.se

Camilla Clarke
Head of Acquisitions TV3/TV8
Camilla.Clarke@mtgvtv.se
+46 (0)8 56 20 23 21

Miriana Skara
Head of Acquisitions TV6
Miriana.Skara@mtgvtv.se

Martin Akander,
Programme Director Swedish drama
martin.akander@mtgvtv.se

SWEDEN



VIASAT / VIASAT FILM

Viasat has a range of pay tv documentary and sports channels as well as the eight Viasat Film film channels. Acquisitions for the Nordic market are handled at the London office.

Viasat Broadcasting UK Ltd
Chiswick Green
610 Chiswick High Road
London W4 5RU
UK

+44 208 742 5100

www.viasat.se

Camilla Hardyment (nee Thornberg
Drenov)
Head of Acquisitions Free & Pay TV
Scandinavia
camilla.hardyment@viasat.co.uk
+44 (0) 20 8742 5127

Sofie Schütt
Acquisitions Manager – Free TV
Scandinavia
sofie.schutt@viasat.co.uk
+44 (0) 20 8742 5114

Alex Elliott
Senior Acquisitions Manager Pay TV
Nordic
alex.elliott@viasat.co.uk
+44 (0) 208 742 5046

Eve Ramagge
Acquisitions Executive – Free TV
Scandinavia
Eve.Ramagge@viasat.co.uk
+44 (0) 20 8742 5107

SWEDEN



TURNER NORDIC AND BALTIC

Turner Broadcasting System International operates versions of core TBS brands, including CNN, TNT, Cartoon Network and Turner Classic Movies, as well as country- and region-specific networks and businesses in Latin America, EMEA and the Asia Pacific region. It runs Pay- and Free-TV-channels, as well as Internet-based services and is a commercial partner with various third-party media ventures; it teams with Warner Bros. and HBO to leverage Time Warner's global reach. Currently, TBS operates more than 130 channels in more than 30 languages in some 200 countries around the world. Turner Broadcasting System International, Inc. is a subsidiary of Turner Broadcasting System, Inc. (TBS), a Time Warner company.

Visiting address:

Östhammarsgatan 68, Stockholm

Postal address:

Box 271 34, 102 52 Stockholm, Sweden

T: +46 8 400 100 00

www.turner.com

Jemma Yates

**Program Director, Turner Nordic and
Baltic**

Jemma.Yates@turner.com

+44 207 693 1027

SWEDEN



SWITZERLAND

Source: European Audiovisual Observatory, Mavise database on TV and on-demand audiovisual services and companies in Europe.

Switzerland is a federation made up of 26 cantons and has four national languages: French, German, Italian and Romansch. This is reflected in the organisation of the audiovisual landscape, with French, German and Italian channels having a major presence on the Swiss market.

However, the different language markets are still dominated by the public channels. The public service broadcaster SRG SSR idée suisse provides through its seven operating units seven television channels (three in German, two in French and two in Italian) and seventeen radio stations.



RSI

Casella Postale
6903 Lugano
Switzerland

T: +41 (0)91 803 51 11
F: +41 (0)91 803 53 55

www.rsi.ch

RSI is part of the group SRG SSR, the Swiss public broadcaster. The Italian unit operates two channels: LA 1 and LA 2. LA 1 is a full service channel aimed at a broad audience. LA 2 is a complementary channel with a focus on sport. There are also children's programs and repeats of news programs from LA 1. The drama editorial line looks for strong and realistic fiction stories. RSI also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions, both for cinema and television.

Dino Balestra
Director

Gabriella de Gara
Head of fiction / Co-productions
fiction
gabriella.degara@rsi.ch
+41 (0)91 803 53 04

Silvana Carminati
Acquisitions fiction
silvana.carminati@rsi.ch
+41 (0)91 803 54 56

Walter Bortolotti
Head of animation and acquisition
short films
walter.bortolotti@rsi.ch
+41 (0)91 803 54 70

SWITZERLAND



RTS

Quai Ernest-Ansermet 20
Case postale 234
1211 Geneva 8
Switzerland

T: +41 (0)58 236 36 36

www.rts.ch

RTS is the national French speaking language public service channel in Switzerland. It operates two channels. RTS 1 is a mainstream channel. The prime-time schedule showcases its major in-house productions. RTS 2 complements RTS 1 with sports coverage, documentaries, arts programming and a special strand for young people. RTS also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions both for cinema and television.

Gilles Marchand
Director

Alberto Chollet
**Head of Fiction, Entertainment and
Youth / (Co-)productions fiction**
alberto.chollet@rts.ch
+41 (0)58 236 82 70

Isabell Hagemann Pouliquen
Acquisitions fiction
isabell.hagemann-pouliquen@rts.ch
+41 (0)58 236 95 46

Izabel Rieben
**Acquisitions youth programs
(feature length and short
animations)**
izabel.rieben@rts.ch
+41 (0)58 236 36 36

SWITZERLAND



SRF is the German language public service channel in Switzerland and operates three television channels. SRF 1 – a high-quality schedule of news and current affairs, light entertainment and arts, with a large proportion of in-house productions – reflects the complex reality of life in culturally diverse Switzerland. SRF zwei gives heavy emphasis to sport, feature films and series. The schedule is aimed more at a younger audience. SRF info offers viewers time-shifted viewing with running repeats of the latest information-based formats – news, sport and the arts. SRF participates in foreign productions involving a Swiss co-producer within the “Pacte”, an agreement aiming to support independent productions both for cinema and television.

Fernsehstrasse 1-4
8052 Zürich
Switzerland

T: +41 (0)44 305 33 11
F: +41 (0)44 305 56 60

www.srf.ch

Rudolf Matter
Director

Urs Fitze
**Head of Fiction / Co-productions
fiction**
urs.fitze@srf.ch
+41 (0)44 305 58 23

Bettina Alber
In house series
bettina.alber@srf.ch
+41 (0)44 305 59 18

Tamara Mattle
Feature Film
tamara.mattle@srf.ch
+41 (0) 44 305 63 38

Lilian Räber
TV Movies
lilian.raeber@srf.ch
+41 (0)44 305 63 77

Esther Rutschmann
Head of administrative department
esther.rutschmann@srf.ch
+41 (0) 44 305 63 09

Heinz Schweizer
Head of acquisitions fiction
heinz.schweizer@srf.ch
+41 (0)44 305 63 44

SWITZERLAND



UNITED KINGDOM

The public service channel BBC1 remains the most popular in the UK (with an audience share in 2010 of 20.8%, just 2% down from 2006), followed by ITV1 (16.6%). The UK television market is also one of the largest in Europe with an extensive number of national thematic channels and also many channels that are targeting other countries. This includes a very large number of Arabic, Asian and Turkish channels with an international focus that are licensed in the UK. (Audience data source: Eurodata TV Worldwide / BARB / TNS UK)

In recent years, there have been significant changes to the media ownership landscape. In 2010, the RTL Group sold the Channel Five Group to the UK company Northern & Shell (involved in publishing, Express Newspapers, and adult channels). At the same time Virgin Media began moving out of the broadcasting sector in order to focus on its distribution business. In June 2010, Virgin Media sold Virgin Media Television to BSkyB (including the Bravo, Challenge, Living, and Trouble brands). The company was re-branded as the Living TV Group. The last broadcasting interests of the company: 50% share in the UKTV channels, a joint-venture with the BBC Worldwide, were sold to the US company Scripps Networks in August 2011. Finally, in 2011 ITV PLC took over Channel Television, the company with the channel 3 licence for the Channel Islands. Aside from STV and UTV, ITV PLC now holds all the channel 3 licences.

In 2010 News Corporation announced its intention to increase its ownership of BSkyB (from 39% to 100%). However, following the phone-hacking scandal and pressure from parliament the bid was eventually withdrawn. Ofcom, following a request of the Culture Minister, launched a consultation in October 2011 in order to review ownership and plurality in the UK media.

Analogue switch-off is well under way in the UK and the planned completion date is October 2012. HD channels are being made available in areas in line with their switch-off of analogue services. Currently this includes BBC HD, ITV1 HD, Channel 4 HD, S4C HD, STV HD, (and from 2012 also FIVE HD)

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



The Promise, 2011 – Production Company: Daybreak Pictures



Hinterland, 2013 – Production company: Fiction Factory

UNITED KINGDOM



The BBC is the largest broadcasting organisation in the world. Its mission is to enrich people's lives with programmes that inform, educate and entertain. It is a public service broadcaster, established by a Royal Charter and funded by the licence fee that is paid by UK households. The BBC uses the income from the licence fee to provide services including 8 national TV channels plus regional programming, 10 national radio stations, 40 local radio stations and an extensive website. BBC World Service broadcasts to the world on radio, on TV and online, providing news and information in 32 languages. It is funded by a government grant, not from the licence fee. The BBC also has a commercial arm, BBC Worldwide. Its profits are returned to the BBC for investment in new programming and services.

Room 7035
BBC TV Centre
Wood Lane
London
W12 7RJ
UK

BBC Childrens
2nd Floor, BBC Bridge House
Media City UK
Salford,
M50 2BH

www.bbc.co.uk

Sue Deeks
Head of Programme Acquisition, Responsible for Feature Films & Series (Fiction) Acquisitions
sue.deeks@bbc.co.uk
T: (020) 8225 6048

Sarah Muller
Head of Drama Development & Acquisitions, CBBC – Responsible for CBBC Acquisitions and Drama submissions from credited TV writers without backing from an Independent Production Company
cbbcdramaandanimationsubmissions@bbc.co.uk

UNITED KINGDOM



BBC INDEPENDENT DRAMA

New Broadcasting House,
7th floor Zone A,
Portland Place,
London W1A 1AA
United Kingdom

www.bbc.co.uk/commissioning

Ben Stephenson
Controller, Drama Commissioning
– Responsible for: Drama on all
BBC channels from independent
production companies & BBC In-
House Drama.
ben.stephenson@bbc.co.uk
Assistant: Emma Genders – (020) 3614 2978

Polly Hill
Head of Independent Drama
polly.hill@bbc.co.uk
Assistant: Emilia Amodio – (020) 3614 0925
emilia.amodio@bbc.co.uk

Lucy Richer
Commissioning Editor
lucy.richer@bbc.co.uk
Assistant: Emilia Amodio – (020) 3614 0925

Matthew Read
Commissioning Editor,
BBC Independent Drama
matthew.read@bbc.co.uk
Assistant: Barbara Erskine –
(020) 3614 2662

Lawrence Cochran
Development Editor
lawrence.cochran@bbc.co.uk
(020) 3614 2662

Susie Watson
Development Co-ordinator
(020) 3164 0926

UNITED KINGDOM



BBC WALES

BBC Cymru Wales (also known as English: BBC Wales or Welsh: BBC Cymru) is a division of the British Broadcasting Corporation for Wales. Based at Broadcasting House in the Llandaff area of Cardiff, it directly employs over 1200 people, and produces a broad range of television, radio and online services in both the Welsh and English languages. Outside London, BBC Wales is the largest BBC production centre in the United Kingdom, partly due to its additional slate of Welsh language programmes for BBC Radio Cymru and the Welsh language television channel S4C.

Drama Zone 2
BBC Cymru/Wales,
Roath Lock,
Porth Teigr,
Cardiff, CF10 4GA
Wales

www.bbc.co.uk/wales

Faith Penhale
Head of Drama, BBC Wales
Assistant: Jan Arwyn Jones
029 20 769536
jan.arwyn.jones@bbc.co.uk
*For all Wales proposals and
e-commissioning queries please contact:*
Will Johnston
Will.Johnston@bbc.co.uk
020 3614 0281

UNITED KINGDOM



BBC NORTHERN IRELAND

Room 3.07 Blackstaff House,
62-66 Great Victoria Street,
Belfast BT2 7BB
United Kingdom

T: +44 28 9033 8845
F: +44 28 9033 8800

www.bbc.co.uk/northernireland

BBC Northern Ireland (Irish: BBC Thuaisceart Éireann / Ulster Scots: BBC Norlin Airlann) is the main public service broadcaster in Northern Ireland. The organisation is one of the three national regions of the BBC, together with BBC Scotland and BBC Wales. Based at Broadcasting House, Belfast, it provides television, radio, online and interactive television content. BBC Northern Ireland currently employs 700 people, largely in Belfast.

Sarah Stack
Senior Script Executive, BBC
Northern Ireland Drama
sarah.stack@bbc.co.uk
+44 28 9033 8845

Stephen Wright
Head of Drama, BBC Northern
Ireland
stephen.wright@bbc.co.uk
Assistant: Bronagh Taylor
+44 28 90 338845

UNITED KINGDOM



BBC SCOTLAND

Zone 2.07
BBC Scotland,
40 Pacific Quay.
Glasgow G51 1DA

T: 0141 422 6000

www.bbc.co.uk/scotland

BBC Scotland (Gaelic: BBC Alba) is a constituent part of the British Broadcasting Corporation, the publicly-funded broadcaster of the United Kingdom. It is, in effect, the national broadcaster for Scotland, having a considerable amount of autonomy from the BBC's London headquarters, and is run by the BBC Trust, who are advised in Scotland by the Audience Council Scotland. Its Scottish headquarters and studios are at BBC Pacific Quay on the south bank of the River Clyde, beside the STV headquarters and the Glasgow Science Centre.

Christopher Aird
Head of Drama, BBC Scotland
Christopher.Aird@bbc.co.uk
+ 44 141 422 6083
For all proposals and e-commissioning queries please contact Audrey McFadden
Audrey.McFadden@bbc.co.uk
(0141) 422 6081

UNITED KINGDOM



CHANNEL 4

124 Horseferry Road,
London SW1P 2TX
United Kingdom

T: +44 020 7396 4444

www.channel4.com

Channel 4 is a public service for information, education and entertainment. The Broadcasting Act 1990 requires that Channel 4 programmes shall: appeal to tastes and interests not generally catered for by ITV, encourage innovation and experiment, be distinctive, maintain a high general standard and a wide range, include a proportion which are educational, provide high quality news and current affairs, include proportions which are European and are supplied by independent producers.

Roberto Troni
Commissioning Editors
rtroni@channel4.co.uk
Editorial administrator: Lisa Walters
lwalters@channel4.co.uk
0207 306 3647

Stuart Cosgrove
Director of Creative Diversity
scosgrove@channel4.co.uk
+44 141 568 7105

Tessa Ross
Controller of Film 4 and Drama
0207 396 4444

Sophie Gardiner
Commissioning Editor
sgardiner@channel4.co.uk

Michelle Mian
Acquisitions Manager
mmian@channel4.co.uk
0207 306 8502

Piers Wenger
Head of Drama
PWenger@channel4.co.uk
Assistant: Sumrah Mohammed
0207 306 3647

Beth Willis
Deputy Head of Drama
Assistant: Sumrah Mohammed
BWillis@channel4.co.uk
0207 306 3647

Surian Fletcher-Jones
Head of Development
SFletcherJones@channel4.co.uk
Programme Coordinator: Sian Robins-Grace
0207 306 8305

UNITED KINGDOM



CHANNEL 5

Five is a public service for information, education and entertainment. It broadcasts 24 hours a day, 7 days a week.

22 Long Acre
London WC2E 9LY
United Kingdom

+44 20 7550 5555

www.channel5.com

Kate Keenan
Head of Acquisitions
Katie.keenan@channel5.com

Marie-Claire Dunlop
Acquisitions & Channel Manager
Marie-Claire.Dunlop@channel5.com
Currently on maternity leave, covered by
Sebastian Cardwell:
Sebastian.cardwell@channel5.com

UNITED KINGDOM



ITV Network Centre,
200 Grey's Inn Road,
London WC1X8HF
United Kingdom

+ 44 (0)20 7843 8000

www.itv.com

ITV is the biggest commercial television network in the UK, broadcasting the most talked about television and making a major contribution to the UK's culture, economy and communities. The ITV Network is made up of 15 regional licences, providing television to viewers across the UK. 11 of the licences in England and Wales are owned by ITV Plc, formed in 2004 following the merger of Carlton and Granada. SMG owns the two Scottish licences, Scottish Television and Grampian; UTV and Channel Television own the licences for Northern Ireland and the Channel Islands respectively.

Steve November
Director of Drama
Steve.november@itv.com

Victoria Fea
Controller of Drama
Victoria.fea@itv.com

Charlie Hampton
Commissioning Editor
Charlie.hampton@itv.com

Jane Hudson
Head of Drama
jane.hudson@itv.com
020 715 74342

UNITED KINGDOM



BSKYB

Sky One is an entertainment channel (with simulcast in HD). In addition to providing a television satellite service to subscribers (over 9.3 million households at the end of March 2011), BSKYB also has a portfolio of TV channels: Sky1, Sky Living, Sky Atlantic, Sky Arts 1 & Sky Arts 2, Sky 3D and Challenge.

Grant Way,
Isleworth,
Middlesex TW7 5QD
United Kingdom

+44 20 7705 3000

www.skyone.co.uk

Sarah Wright
Controller of Acquisitions
sarah.wright@bskyb.com
0207 032 0343

Huw Kennair-Jones
Commissioning Editor Drama
Huw.Kennair-Jones@bskyb.com

Anne Mensah,
Head of Drama
Anne.Mensah@bskyb.com
0207 0320304
Currently covered by Cameron Roach:
cameron.roach@bskyb.com

Lucy Criddle,
Senior Acquisitions Manager
lucy.criddle@bskyb.com
0207 0320357

Michael Whelan,
Acquisitions Manager
0207 0323521

UNITED KINGDOM



UKTV

UKTV is a major industry player and one of the most important and successful multi-channel providers in the UK. Formed in 1997, it is an independent commercial joint venture, between Virgin Media and BBC Worldwide, the commercial arm of the BBC. Attracting 36 million viewers each month, the network offers a broad range of quality programming across its entertainment, lifestyle and factual offerings - Watch, GOLD, Dave, Alibi, Eden, Blighty, Yesterday, Home, Really and Good Food. UKTV currently operates 24 broadcast streams when multiplexes (+1s) and HD channels are taken into account, and complementary websites for every channel brand. The success of UKTV is based on its programming including award-winning shows from the BBC and an increasing number of original commissions (around 700 hours a year) and acquisitions. All ten UKTV channels are available on Sky Digital and Virgin Media, with Dave, Yesterday and Really also on Freeview.

160 Great Portland Street,
London, W1W 5QA
United Kingdom

+44 20 72996200

uktv.co.uk

Alexandra Finlay
**Head of Acquisitions and Co-
Productions**
alexandra.finlay@UKTV.co.uk

Jane Rogerson
Director of Commissioning
jane.rogerson@UKTV.co.uk
020 7299 6168

Tanya Qureshi
Development Producer
Tanya.Qureshi@uktv.co.uk
020 7299 6179

UNITED KINGDOM



S4C has a statutory obligation to broadcast to a majority of Welsh language output during peak viewing hours (1800 – 2200). The schedule provides a wide variety of popular TV – drama, entertainment, sports, music, news and current affairs, games and quizzes, youth and children's programming.

Parc Ty Glas,
Llanishen,
Cardiff CF14 5DU

T: +44 0870 600 4141

www.s4c.co.uk

Gwawr Lloyd
Drama Commissioner

Angharad P Jones
Commissioning Department contact
angharad.p.jones@s4c.co.uk
+44 29 2074 1426

UNITED KINGDOM



STV's broadcasting business incorporates two licences – one for the north of Scotland and one for central Scotland. Together, these services produce dedicated regional programming to over three and a half million viewers across Scotland each week. STV's wide range of programming reflects Scotland's distinctive political, legal, educational, cultural and sporting institutions via news, current affairs and non-news programming, including original drama and factual documentaries. News is at the heart of both services, with STV News bringing viewers live, comprehensive and up-to-the-minute news from across the region with regular evening news programmes and bulletins throughout the day.

2nd Floor,
Bewlay House,
Swallow Place,
London, W1B 2AE

T: 0141 300 3704

www.stv.tv

Margaret Enefer
Head of Drama
margaret.enefer@stv.tv
0207 2901341

UNITED KINGDOM



MEDIA DESKS CONTACT DETAILS (FOR COUNTRIES LISTED)

AUSTRIA

MEDIA Desk Austria
www.mediadeskaustria.eu
Ms. Esther Krausz
Osterreichisches Filminstitut
6, Stiftgasse
A-1070 WIEN
Tel.: 43 1 526 97 30406

BELGIUM

MEDIA Desk Belgique
Communauté française de Belgique
www.mediadeskbelgique.eu
Mr. Thierry Leclercq
44, bd Léopold II
B-1080 BRUXELLES
Tel.: 32 02 413 22 45
Fax: 32 02 413 30 50

BELGIUM

MEDIA Desk Belgique
Vlaamse Gemeenschap
www.mediadesk-vlaanderen.eu
Ms. Nathalie Goethals (maternity leave)
Mr. Bert Lesaffer (acting head)
c/o Vlaams Audiovisuel Fonds vzw
Huis van de Vlaamse film
Bischoffsheimlaan 38

CYPRUS

MEDIA Desk Cyprus
www.mediadeskcyprus.eu
Ms. Ioanna Americanou
Othellou 9
CY-1016 Nicosia, Cyprus
Tel.: 357 22 305 367
Fax: 357 22 305 368

CZECH REPUBLIC

MEDIA Desk CZ
www.mediadeskcz.eu
Ms. Daniela Stanikova
Ceska filmova komora o.p.s.
Narodni 28, CZ-110 00 Prague 1
Tel.: 420 221 105 209 or 210
Fax: 420 221 105 303

DENMARK

MEDIA Desk Danmark
www.mediadeskdenmark.eu
Ms. Ene Katrine Rasmussen
Vognmagergade, 10, DK-1120 KØBENHAVN
Tel.: 45 33 74 34 67
Fax: 45 33 74 34 65

FINLAND

MEDIA Desk Finland
www.mediadeskfinland.eu
Ms. Kerstin Degerman
Finnish Film Foundation
K 13, Kanavakatu, 12
FIN-00160 HELSINKI
Tel.: 35 89 62 20 30 13
Fax: 35 89 62 20 30 70

FRANCE

MEDIA Desk France
www.mediafrance.eu
Ms. Nathalie Chesnel
9, rue Ambroise Thomas
F-75009 Paris
Tel.: 33 1 47 27 12 77
Fax: 33 1 47 27 04 15

FRANCE

MEDIA Antenne Strasbourg
www.mediafrance.eu
Mr. Olivier Trusson
1, parc de l'Etoile, F-67076 STRASBOURG
Tel.: 33 388 60 95 89
Fax: 33 388 60 98 57

FRANCE

Antenne MEDIA Grand Sud
www.mediafrance.eu
Ms. Isabelle Nobio
c/o Région Provence-Alpes-Côte d'Azur
27 Place Jules Guesde
F-13481 Marseille Cedex 2
Tel.: 33 (0)4 91 57 51 38
Fax: 33 (0)4 91 57 58 36

MEDIA DESKS CONTACT DETAILS

**GERMANY**

MEDIA Desk Deutschland
www.mediadesk-deutschland.eu
Acting head, Christiane Siemen
14-16, Friedensallee
D-22765 HAMBURG
Tel.: 49 40 390 65 85
Fax: 49 40 390 86 32

GERMANY

MEDIA Antenne Berlin-Brandenburg
www.mediadesk-deutschland.eu
Ms. Susanne Schmitt
August Bebel Strasse, 26-53
D-14482 POTSDAM
Tél.: 49 331 743 87 50
Fax: 49 331 743 87 59

GERMANY

MEDIA Antenne Düsseldorf
www.mediadesk-deutschland.eu
Ms. Heike Meyer Döring
14, Kaistrasse
D-40221 DUSSELDORF
Tél.: 49 211 930 50 14
Fax: 49 211 93 05 05

GERMANY

MEDIA Antenne Munich
www.mediadesk-deutschland.eu
Ms. Ingeborg Degener
Sonnenstrasse 21
D-80331 MUNICH
Tel.: 49 89 54 46 03 30
Fax: 49 89 54 46 03 40

GREECE

MEDIA Desk Hellas
www.mediadeskhellas.eu
Mr. Ilias Tasopoulos
c/o Greek Film Center
7 Areopagitou str
11742 Athens
Tel.: +30 210 3234414
Fax: +30 210 3234444

ICELAND

MEDIA Desk Island
www.mediadesk.is
Ms. Sigridur Vigfusdottir
Hverfisgata 54
IS-101 REYKJAVIK
Tel.: 354 5 62 63 66
Fax: 354 5 62 71 71

IRELAND

MEDIA Desk Ireland
www.mediadeskireland.eu
Ms. Siobhan O'Donoghue
6, Eustace Street
IRL-DUBLIN 2
Tel.: 353 1 679 18 56
Fax: 353 1 670 96 58

IRELAND

MEDIA Antenne Galway
www.media-antenna.eu
Ms. Eibhlín Ní Mhunghaile
Cluain Mhuire Monivea Road
IRL-GALWAY
Tel.: 353 91 77 07 28
Fax: 353 91 77 07 46

ITALY

MEDIA Desk Italia
www.media-italia.eu
Mr. Giuseppe Massaro
c/o Roma Lazio Film Commission
Via Caio Mario, 7
00192 Roma
Tel. +39 06 32 44 308 /
+39 06 32 64 77 28
Fax +39 06 97 99 08 17

ITALY

MEDIA Antenna Torino
www.media-italia.eu
Ms. Silvia Sandrone
c/o Associazione F.E.R.T.
Cineporto, Via Cagliari 42
I-10153 Torino
Tel.: +39 011 539 853
Fax: +39 06 321 47 22

NETHERLANDS

MEDIA Desk Nederland
www.mediadesknederland.eu
Ms. Dominique van Ratingen
Jan Luykenstraat 2
NL-1071 CM Amsterdam
Tel.: 31 20 305 30 40
Fax: 31 20 675 28 78

NORWAY

MEDIA Desk Norge
www.mediadesk.no
Ms. Sidsel Hellebø-Hansson
c/o Norsk Filminstitut
PO BOX 482 Sentrum
N - 0105 OSLO
Tel.: 47 22 47 45 00
Fax: 47 22 47 80 41

MEDIA DESKS CONTACT DETAILS

**POLAND**

MEDIA Desk POLSKA
www.mediadeskpoland.eu
Ms. Joanna Wendorff
Media Desk Polska
ul. Chelmska 19/21 lok. 229
PL-00-724 Warszawa
Tel./Fax.: (48) 22 851 10 74 or
Tel./Fax.: (48) 22 559 33 10

SPAIN

MEDIA Desk España
www.mediadeskspain.eu
Mr. Jesús Hernández
Ciudad de la Imagen
c/ Luis Buñuel, 2-2ºA
E - 28223 Pozuelo de Alarcón MADRID
Tel.: 34 91 512 01 78
Fax: 34 91 512 02 29

SPAIN

MEDIA Antenne Barcelona
www.antenamediacat.eu
Mr. Alex Navarro
MEDIA Antenne Barcelona
Mestre Nicolau 23
E-08021 Barcelona
Tel. (34-9) 3 552 49 49
Fax (34-9) 3 552 49 53

SPAIN

MEDIA Antenne San Sebastián
www.mediaeusk.eu
Ms. Verónica Sánchez
MEDIA Antenne San Sebastián
Paseo Colón 16, entreplanta
E-20002 San Sebastián-Donostia
Tel. (34-94) 332 68 37
Fax (34-94) 327 54 15

SPAIN

MEDIA Antenne Sevilla
www.antenamediaandalucia.eu
Ms. Carmen del Río
MEDIA Antenna Seville
Instituto Andaluz de las Artes y las Letras
Consejería de Cultura - Junta de Andalucía
Edificio Estadio Olímpico. Puerta M
41092 Sevilla
Tel. + 34 955 929 047

SWEDEN

MEDIA Desk Sverige
www.mediadesksweden.eu
Ms. Ulrika Nisell
Svenska Filminstitutet
5, Borgvagen, S-10252 STOCKHOLM
Tel.: 46 8 665 12 05
Fax: 46 8 666 37 55

SWITZERLAND

MEDIA Desk Suisse
www.mediadesk.ch
Ms. Corinna Marschall
Neugasse 6
CH-8005 Zürich
Tel.: 41 43 960 39 29
Fax: 41 43 211 40 60

UNITED KINGDOM

MEDIA Desk UK - London
www.mediadeskuk.eu
Ms. Agnieszka Moody
c/o UK Film Council
10 Little Portland Street
UK- LONDON W1W 7JG
Tel.: 44 20 7861 75 11
Fax: 44 20 7861 79 50

UNITED KINGDOM

MEDIA Antenne Glasgow
www.mediadeskuk.eu
Ms. Emma Valentine
c/o Creative Scotland
249, West George Street
UK-G2 4QE GLASGOW
Tel.: 44 1 41 302 1776
Fax: 44 1 41 302 1711

UNITED KINGDOM

MEDIA Antenna Cardiff
www.mediadeskuk.eu
Ms. Judy Wasdell
c/o Creative Industries
33-35 Stryd Gorllewin Bute/West Bute street
UK- Cardiff, CF10 5LH
United Kingdom
Tel.: (44-2920) 436111
Fax: (44-2920) 444778
Mobile: (44) 7789 371388

To find contact details for all remaining MEDIA Desks in the EU please see
http://ec.europa.eu/culture/media/programme/overview/who/desks/index_en.htm

MEDIA DESKS CONTACT DETAILS

